C.A.A. MINISTRIES

Church Administration Assistance

"Outreach Connect"

Administrator's Configuration Documentation

The first step in configuration is to open your browser and enter the provided URL, or you may click the links provided in the PDF document that will be attached to your "Outreach Connect" welcoming e-mail message. These links will be hyperlinked to your churches personal and private "Outreach Connect" sites. These links will open to your login page, and we recommend that you click the "Bookmark this Page" link for future use.

Once opened the first thing you will see is a page asking for the administrator's username and password – Your initial username and password has been provided and setup in the pre-configuration by CAA Ministries. After entering your provided username and password click the start button that opens the administrator's site. Next, start by clicking the Configuration Icon

Step 1 of configuration is to check for all conditions **green**. This should be the case. If all conditions are not green you will need to contact the CAA Ministries customer service department by dialing toll free 1-888-590-4477. Nothing should need to be done here, except check that everything shows in green and then you click the button for Step 2.

Step 2 is also a "do-nothing" page as the database parameters have already been setup by the CAA Ministries Master Administrator staff. Go to Step 3.

Step 3, here (assuming you are the administrator) you may change and personalize your name, email address, user ID, and password. (The purpose for the email address is for notification if you check the boxes labeled, "Do you want to get notified whenever a document is checked in or out?") You will also need to set your Time zone parameters. Enter a number that reflects the number of hours of difference between your time zone and the Pacific Time zone. (Examples; Eastern=3, Central=2, Mountain=1, Pacific=0)

Again, this is where you choose the user ID and password you will be using for running the program as the administrator. The title of the program pages should already be filled in, but you can change that to be whatever you would like. Then, if you like, you can change the field labeled "Please enter how many lines per page in the program's Control Panels." However, the default of 50 will be fine, in the beginning. Go to Step 4. button

Step 4 is where you will get a confirmation of everything you have previously entered. If no errors (no red lines) press the Configure Program button and voila! You are ready to start the program. Click the "Now Start the Program button", and you will come (again) to the login page at:
This is the web address (URL) you will be using whenever you start the program, so it may be a good idea to bookmark it.

After entering the same user ID and password that you setup when configuring, you will come to the main "Control Panel." Here you may Upload Documents, Add People, Define Document Categories, Send E-mail notifications, Generate Reports and/or re-configure the program.

Define Document Categories

After pressing this button, you will initially see a page with one blank field to enter. Type a category name (example: "**Adult**" -- without the quotes) into that field and press Update Categories. That then shows you a list of the categories you've typed. The list will have one entry - Adult. But you can type another. Etc. And you will end up with as many categories as you would like or need. Then press Back to Document Listing when you're finished.

Upload Documents

After pressing the Upload Documents button, you see a page where you can upload 10 documents at a time. You press the Browse button to locate a prospect or guest informational document on your hard drive, and you then assign a category to the document. (You would have previously setup the categories using the Define Document Categories button.)

Suggestion: put all the prospect or guest informational documents you intend to upload into the same folder. Thus, the Browse button will always open in that same folder, making the process of locating a document to be very fast. After selecting up to 10 documents and assigning each a category, you press the Upload the Document(s) button. And they will be uploaded (made available) to your people. Should you need to upload more than 10 just repeat the process.

Add People

You get to say who can use the program. Here you enter a list of people's names and e-mail address. Also you will need to define a username and password for each person. It operates the same way as the Define Document Categories program. When finished entering your people, you would notify your people and give them their user ID and password. Plus you would provide them withy the URL to go to a copy of the link provided by CAA Ministries in your welcome e-mail

The URL web address that your individual Outreach team members will be typing will be sent to you in a welcoming e-mail message. This directs them to an opening page that allows them to login and check-in/check-out prospect and guest documents.

Full Report

This button is used to get a status report of who has checked-out or in any prospect or guest documents, and the date and time. It will be obvious how it works, once your people have used the program a while.

Outreach Team Members Check-In Check-Out Program

Provide your people (outreach team members) with their username and password. Also you will need to instruct them to use to the provided URL or use the Outreach Team Members login link that was included in the welcoming e-mail attachment to open the program.

Once they open the program, they will see a screen that asks for their username and password. They enter those, and press the **Start** button. On the next page, they will see a list of the prospect and guest documents that you uploaded.

They have two actions they can do: **View Doc** and **Check-Out**. The View Doc link gives them the ability to view the prospect or guest informational document. When they press the View Doc link, they will see some info about the document and a View Here link. Depending upon which browser they are using, they will either see the document appear on their screen. OR it will ask if they wish to save it to their hard disk. Should the outreach team member decide to follow-up with this prospect or guest they need to print the document at this point for their use in the follow-up process.

Note: that this is just a way to preview the prospect or guest informational document.

When they decide they'd like to Check-Out the document, they press the **Check-Out** link on the same line as the document name. This also gives them a chance to view the document, if they wish, but the main thing is that they can press the button labeled: Yes, I Am Checking Out This Document Now.

They can (optionally) enter some comments as they check-out the document. It is up to you to tell the users what kind of comments you would like to see here.

After pressing the button, they come back to the Documents Listing Control Panel. But now there is a red **Checked-Out** message on that document. No one else can access that prospect or guest informational document. (This prevents two people form contacting and following-up with the same person).

Everyone else will see the word **Info** next to a checked-out document. And when clicked, Info will reveal who has checked-out the document, the date and time they checked it out.
BUT for the user who has checked out the document, when that user views the Document Listing, there will be a **Check-In** link next to that document. Thus, only the original user who checked-out the document can check it back in.

And when the original user pressed the **Check-In** link, they will see another window with response fields and comments boxes so they can enter comments and notes explaining the action taken and results of their follow-up process. They may also enter their suggested or recommended next actions. It is up to you the outreach coordinator to tell the users (outreach team members) what kind of comments and information you would like to see here. They may also choose to copy a SS teacher or other person with the results of their follow-up by e-mail. They will simply enter their e-mail address in the provided box separating them with a (,) or (;).
Then they press the button labeled Yes, I Am Checking-In This Document Now. And when that happens, the document is status changes to **Completed**.

Note that any document that has been previously checked-out now has a new kind of link under the View column. It will say View History instead of View Doc. And thus, anyone can view the entire history of who checked out that document, and when.

Note that there is one button at the top of the page called Select Documents. This is there in case your list of uploaded documents is rather long. Thus, the users can select which documents they would like to see in the Documents Listing. They can select by Category or by Title.

Thus (for example) if they choose the **Adult** category, they will see only the documents in that category. They can even choose to view a document with the word 'Smith' in the title AND the category Adult. But that will likely only result in one document to see in the listing.

As you use the program you will find several other features and function that are not covered in this documentation. They are very useful features that will be obvious to there function and purpose. Should you need additional assistance please contact CAA Ministries toll free at 1-888-598-8934?

Five Step Quick Start Guide

1. Before you get started you should have saved the information for each one of your guests and prospects as a separate document. These documents may be saved in a word, PDF, or excel format. We recommend that you name each document using the guest or prospects name and the date of their visit, or the date it was created. (Example: Mike Turner Family 02-01-2007) Then you should store these documents in a folder on the administrator's computer named "Outreach Prospects". This will allow you to locate and identify the documents you need to upload to the Outreach Connect program easier and more efficiently. This will also allow your outreach team members to login to their site and see the prospect or guest names in the list. They will then have the option to view and/or Check-out the attached document(s) and follow-up.

2. Next, login to the "Outreach Connect" Administrator's Site using the provided links, user ID, and password. You will see a blue band that contains several icons. First, click on the icon titled "Configure" and start by clicking step 3. This is where you will be able to personalize some of the information and functions for your sites configuration. You may also change your administrator's user ID and password.

3. Next, you will need to click the icon titled "Add People". This is where you will need to enter the name and e-mail address for each member of your outreach ministry team. Also, you will need to assign each person with a user ID and Password.

4. Next, you will need to click the icon titled "Define Document Categories". You will need to enter the different categories you prefer to use. Categories are used according to how you wish to structure your church's outreach ministry follow-up process. For example you may want to categorize documents by age groups, Sunday School classes, or specific ministry teams. This allows outreach team members to better identify prospects or guests that they will relate to, or that they are trained and/or are recommended to follow-up with.

5. You are now ready to upload and post your prospect and guest information to your sites. Click the icon titled "Upload Documents" this will open a window where you can upload as many as ten documents at a time. Click the browse button and navigate through your saved information until you locate the folder and files you save in the above step #1. Add the prospects and guests to the upload list and assign each with the appropriate category. Finalize by clicking the button at the button that reads "Upload the Document(s)" Your prospects should now be displayed in a list on both the administrator and team member sites with the status reading "Available".

Congratulations, you are now ready to launch your outreach ministry into action!