



Updated 3/30/21

Realm Tutorials

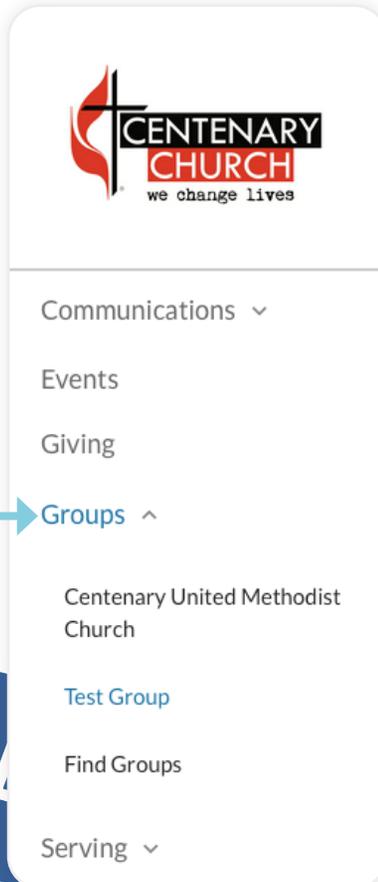
Managing Groups

Before Church-Wide Invitation

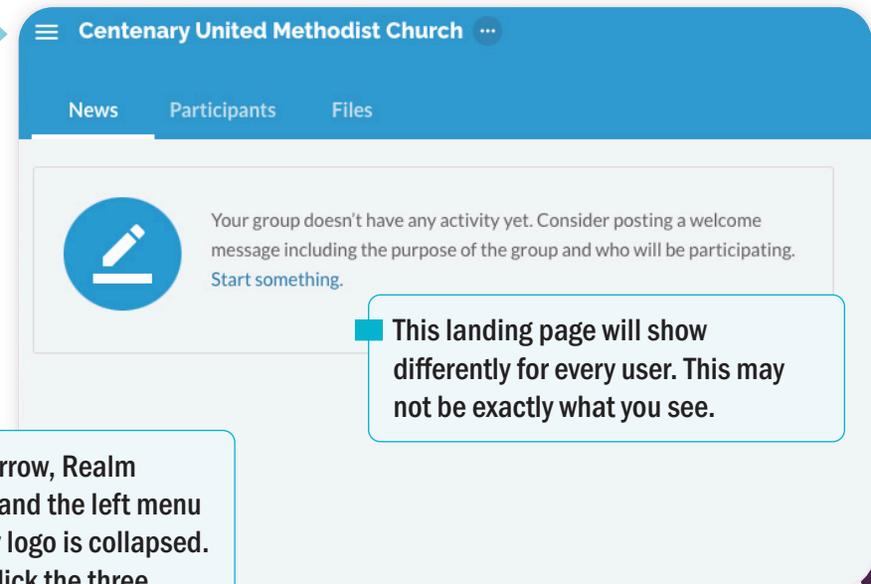


As a Group Leader, you have been invited to use Realm. Not everyone in the congregation has been invited yet. Please keep that in mind as you begin to use Realm for your group management.

1.... To manage your group, first click Groups, in the left sidebar. You will then get an expanded menu of all the groups you lead or are part of. Click on the name of a group you are a leader of.



Leader designations are made by the Centenary office, so let the office know if there are corrections needed.



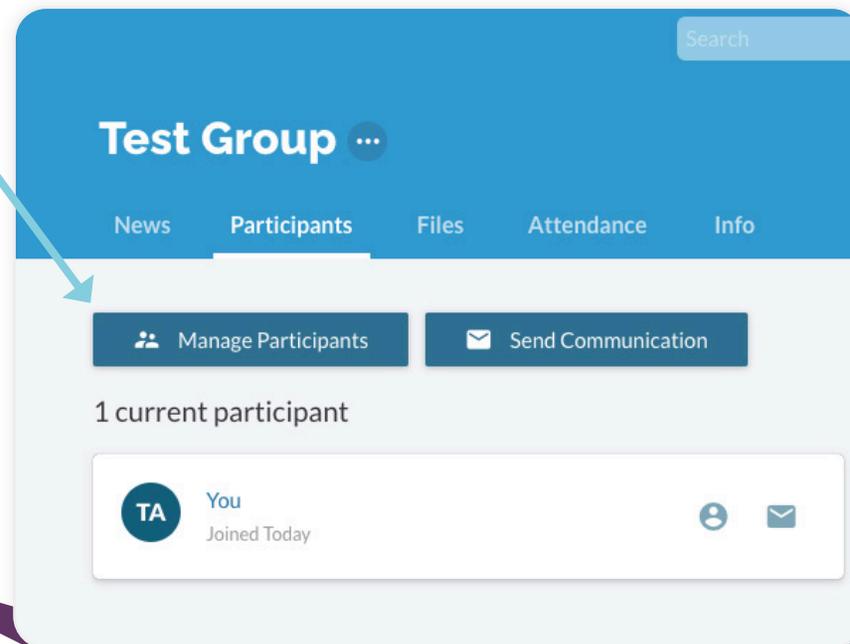
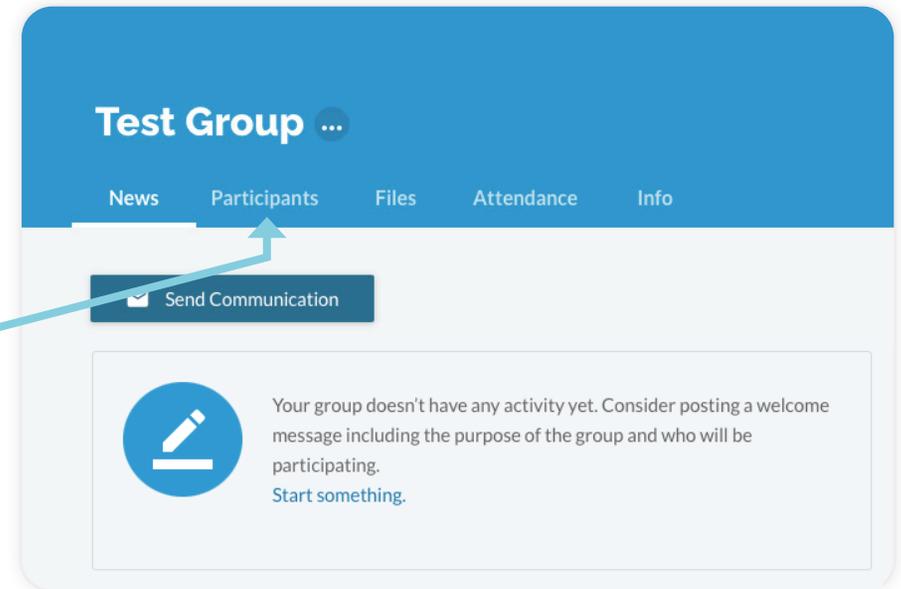
If your screen is narrow, Realm resizes the screen and the left menu with the Centenary logo is collapsed. To see the menu, click the three lines.

This landing page will show differently for every user. This may not be exactly what you see.

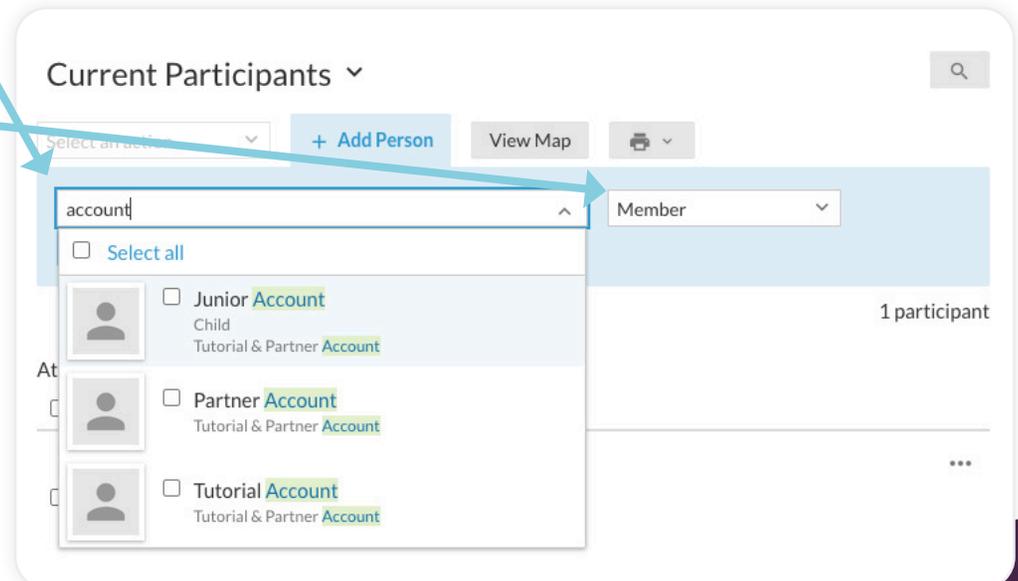
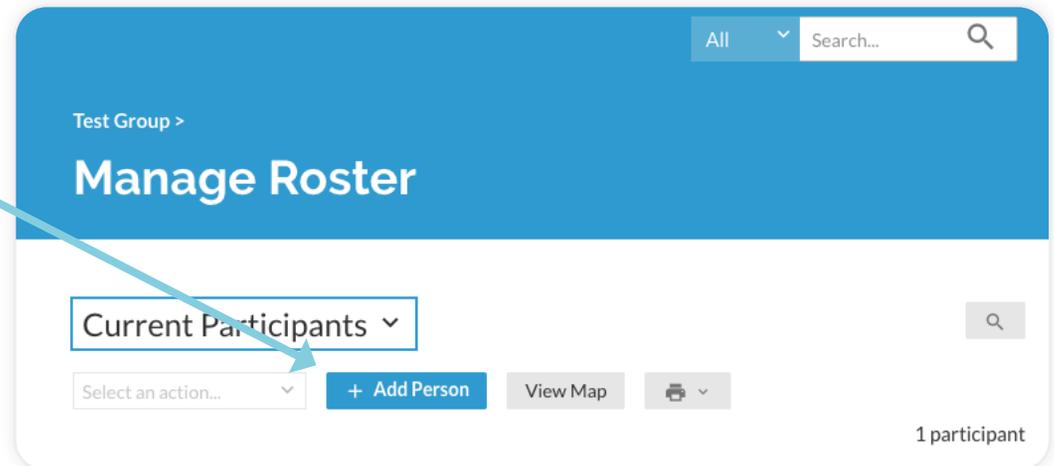
If you have not yet created an account, please follow the "Account Sign-up" tutorial first.

To sign up for a Centenary Realm account, you must be invited. If you have not yet received an emailed invitation, please contact the Centenary office at office@mankatocentenary.org.

- 2.... Once you click the group name, you will first go to the News tab for the group. The newsfeed will most likely be empty and that is good. Not everyone has a Realm login, so DO NOT start posting on group newsfeeds yet.
- 3... You may first need to populate your group with those who participate in your group. To add people, click the Participants tab in the top blue bar.
- 4.... In the Participants tab, click the Manage Participants button.



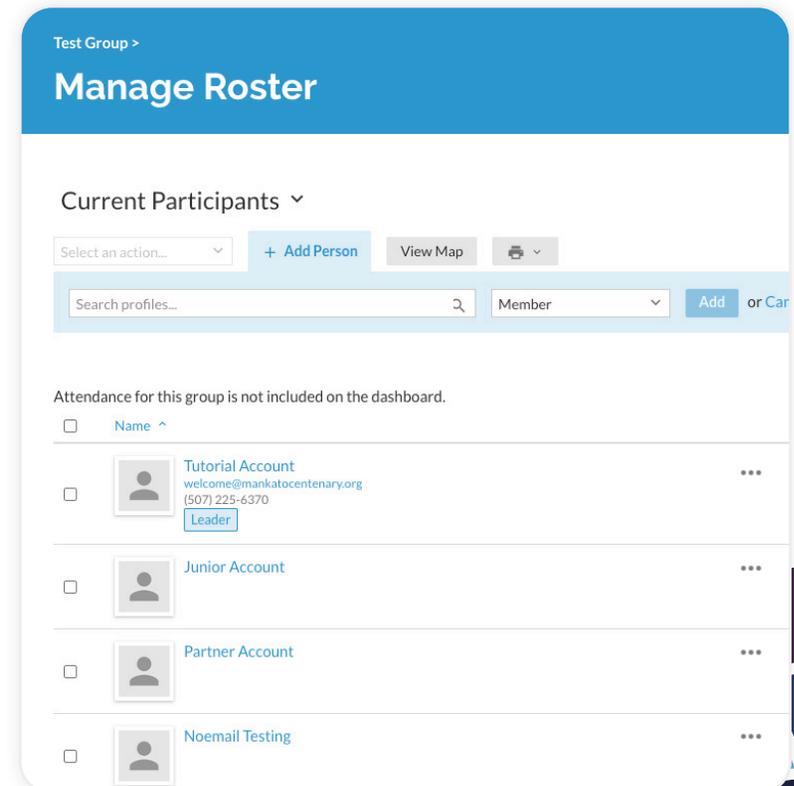
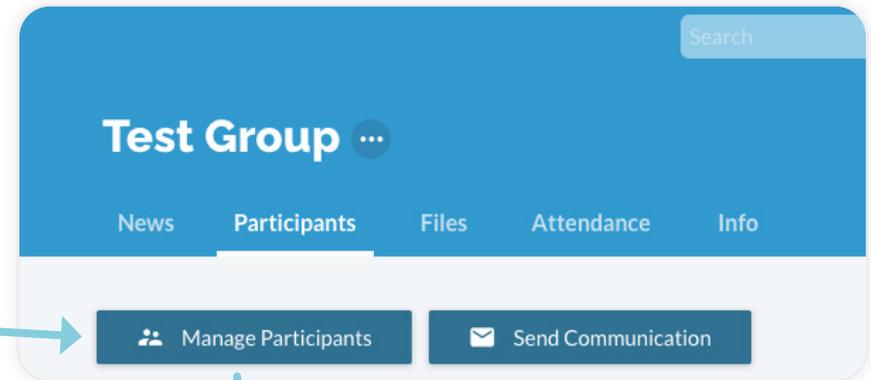
- 5....** Click the + Add Person button to start adding your group members.
- 6....** Search by a person's name to add them. It is easiest to start by using their last name.
- 7....** Once you locate the person you wish to add, check the box next to their name and they will be added. You can add more than one person at a time.
- 8....** You can add group Members, or group Guests. If you need to add a leader to the group, ask the office to do this for you.



9.... Once you have all of your group members added, you can see their contact information and make sure you have the correct information. If you have received new information from your group members, please let the church office know, so records can be kept up-to-date. It is easiest to see the information when you click the Manage Participants button. You can also click on the person's name to see all of their information.

10.. As a group leader when not everyone has a Realm account, we are asking that you go very slowly when using Realm. Please at this time only use Realm to

- 1) Keep your group participant list current
- 2) Keep up to date with contact information
- 3) Print a roster
- 4) Print an attendance sheet and mark attendance
- 5) Print mailing labels



1.... To **print a roster**, navigate to the group you want to print the roster for, click Participants, click Manage Participants, and then click on the gray printer icon.

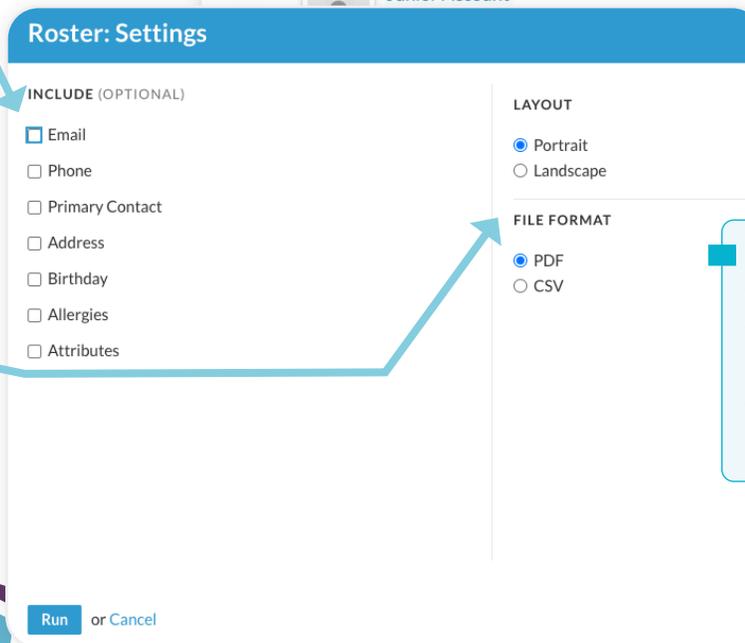
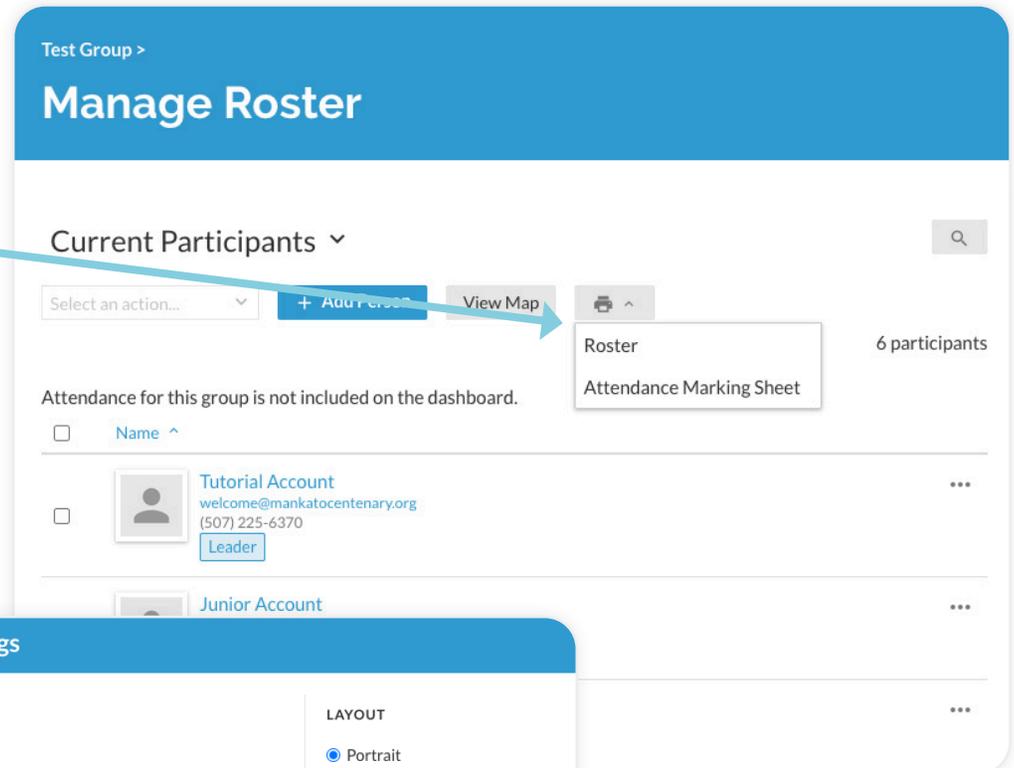
In the pull-down, click Roster.

2.... Check the information you would like to include in the roster. Email, phone, address, birthday and allergies are self explanatory.

Primary Contact is used for children, and lists their parent/guardian. We are not currently using Attributes, so that is blank right now.

3.... You can choose to get a PDF file to print or save, or download a CSV file that you can open with Excel or a different spreadsheet program.

4.... Click run to get your roster.



Including an address on the roster will use the Home Address on file. If the person has an Alternate Address (such as a winter residence), this will not include that. The roster only shows Home Address.

5.... If you chose to get a CSV file, when you click Run, the file will be downloaded to your computer. If you chose PDF, a new dialog box opens and you can preview the roster.

6.... Click Download to download the PDF to your computer.

7.... This button will also download the PDF.

8.... Click the printer icon to print the roster without downloading it.

The screenshot shows a web browser displaying the 'Test Group Roster' page. At the top, a blue header contains the title 'Test Group Roster'. Below the header is a light blue information box with a circular icon and the text: 'You may see a Print icon below or via hover. If not, click "Download" to print. Recommended browsers for printing'. The main content area is dark-themed and features a preview of a roster on the left and contact information on the right. The contact information includes the church name 'Centenary United Methodist Church', the title 'Roster for Test Group Group', the ministry area 'Other Groups, Group: Test Group', and a 'Name' field. Below this, there are three account types: 'Tutorial Account' (with phone number (507) 225-6370 and email welcome@mankatocentenary.org), 'Junior Account', and 'Partner Account', each with the address 501 S 2nd St, Mankato, MN 56001-3705. At the bottom of the page, there is a 'Download' button and a 'Close' link. Three light blue arrows point from the text instructions to the 'Download' button, the printer icon in the browser toolbar, and the 'Close' link.

- 1....** To **print an Attendance Marking Sheet**, you must first have the office schedule an event to attend. Contact the Centenary office to schedule the event.
- 2....** Once an event is scheduled by the office, you can print out an Attendance Marking Sheet for one or multiple events.
- 3....** Choose the date range that includes the event or events you want an attendance sheet for. Check the information you would like to include in the roster such as event name, event time, email, phone or other information.
- 4....** Click run to get your sheet.

Test Group >

Manage Roster

Current Participants ▾

Select an action... ▾ + Add Person View Map  ^

Attendance for this group is not included on the dashboard.

Name ^

 Tutorial Account
welcome@mankatocentenary.org
(507) 225-6370
Leader

Junior Account

6 participants

Roster
Attendance Marking Sheet

Marking Sheet: Settings

FILTER

Date Range*
This Month ▾

03/01/2021  until 03/31/2021 

LAYOUT

Portrait
 Landscape

INCLUDE (OPTIONAL)

Event Name
 Event Time
 Email
 Phone
 Primary Contact
 Birthday
 Allergies
 Include Inactive Profiles

Run or Cancel

5.... A new dialog box opens and you can preview the Attendance Marking Sheet.

6.... Click Download to download the PDF to your computer.

7.... This button will also download the PDF.

8.... Click the printer icon to print the sheet without downloading it.

Test Group - March 2021

You may see a Print icon below or via hover. If not, click "Download" to print. [Recommended browsers for printing](#)

Test Group - March 2021 | 1 / 1 | 81% | [Icons]

Centenary United Methodist Church
Marking Sheet for Test Group Group
Date Range: Mar 1-Mar 31, 2021 | Ministry Area: Other Groups, Group: Test Group

Name	Admin Created Test Event Attendance Mar 29 12p	Double Check No Email Mar 30 9a
Tutorial Account		
Leader		
Junior Account		
Partner Account		
Kylie Beran		
Noemail Testing		
Notification Testing		
Testing User		

Download or Close

1.... To **print mailing labels**, navigate to the Manage Participants page. To print labels for everyone, click the box at the top of the column. To select just some people, click the box next to only the people you wish to get mailing labels for. This will generate a PDF that could be printed directly on to mailing labels. Each person in your group will get their own mailing label.

2.... Once you check at least one person, the Select an action drop-down menu becomes active and you can choose Print Individual Labels.

Test Group >

Manage Roster

Current Participants ▾

Select an action... ▾ + Add Person View Map 

6 participants

Attendance for this group is not included on the dashboard.

<input type="checkbox"/>	Name ^	
<input type="checkbox"/>	 Tutorial Account welcome@mankatocentenary.org (507) 225-6370 Leader	...
<input type="checkbox"/>	 Junior Account	...
<input type="checkbox"/>	 Partner Account	...
<input type="checkbox"/>	 Noemail Testing	...
<input type="checkbox"/>	 Notification Testing ksberan@gmail.com	...
<input type="checkbox"/>	 Testing User kysu7@yahoo.com (507) 404-0049	...

Test Group >

Manage Roster

Current Participants ▾

Select an action... 6 ^ + Add Person View Map 

Print Individual Labels

Attendance for this group is not included on the dashboard.

<input checked="" type="checkbox"/>	Name ^	
<input checked="" type="checkbox"/>	 Tutorial Account welcome@mankatocentenary.org (507) 225-6370 Leader	
<input checked="" type="checkbox"/>	 Junior Account	

Using these steps to get a mailing label will provide you with the person's current mailing address. Some people have multiple addresses on file (such as a winter temporary residence). The office maintains the dates when people switch between mailing addresses. Using this method will give you the mailing address based on the current information the office has.

3.... Realm will ask how you would like your labels ordered. Click the button next to the choice you would like.

4.... A new dialog box opens and you can preview the labels.

5.... Click Download to download the PDF to your computer.

6.... This button will also download the PDF.

7.... Click the printer icon to print the labels without downloading the PDF.

Print Order

Print labels by postal code
 Print labels in alphabetical order

 If you have problems printing, visit our [troubleshooting page](#).

or

Roster Labels

 You may see a Print icon below or via hover. If not, click "Download" to print. [Recommended browsers for printing](#)

Labels

1 / 1 | - 81% + |   

 1	Testing User 18793 Sunset Rd Hawkeye, IA 52147	Noemail Testing 116 Marabou Dr Mankato, MN 56001-5532	Junior Account 404 10th St S New Ulm, MN 56073-3446
	Notification Testing 116 Marabou Dr Mankato, MN 56001-5532	Tutorial Account 404 10th St S New Ulm, MN 56073-3446	Partner Account 404 10th St S New Ulm, MN 56073-3446

or

- 1....** To **Mark Attendance** for an event, you must first have the office schedule an event to attend. Contact the Centenary office to schedule the event.
- 2....** After an event has happened, you can mark the attendance in Realm. If you would like to have an attendance sheet at your event to assist with tracking, please refer to the earlier section about printing an Attendance Marking Sheet.
- 3....** To mark the attendance of an event, navigate to your group and then click Attendance. You will then see a list of events that you can mark attendance for.
- 4....** Click the event name and you will see your group members. Mark each person who was there.
- 5....** To add someone who is not in your group, click the + Add Person button and search for their profile.
- 6....** When you have finished selecting your attendees, click Done.

Test Group ...

News Participants Files **Attendance** Info

Mark Attendance

[Admin Created Test Event Attendance](#)
Monday, March 29, 12:00pm

Groups > Test Group Past Events

Mark Attendance
Monday, March 29, 2021 / Admin Created Test Event Attendance

Attendance for this group is not tracked. [Learn More](#)

[+ Add Person](#) [Select All](#) [Clear All](#) 0 Total

<input type="checkbox"/> Junior Account	<input type="checkbox"/> Partner Account	<input type="checkbox"/> Tutorial Account Leader 41 years old
<input type="checkbox"/> Noemail Testing	<input type="checkbox"/> Notification Testing	<input type="checkbox"/> Testing User 41 years old

[Done](#)

At this time, please do not use Realm for other functions, such as posting to the Newsfeed, emailing group members, or creating events.

We will be working to use these features in the future, as more people create Realm accounts and are familiar with the settings.

