realm For Small Group Leaders

Realm is Glen Mar's people organization system. It's used to store contact information, attendance, giving, participation in ministries and groups, allergies and special needs, and so much more. Most people who are part of the Glen Mar community are in Realm, even if they don't appear in the directory and/or they don't have a login.

As a small group leader, you can use Realm to communicate with your group members, to keep track of attendance so you know if someone is missing, to share dates and schedules, and to provide materials, documents, links, and more. When your group is up to date in Realm, the church staff can see how people are connected (Are they involved in a small group or ministry group? Who is their small group leader?) and who is not yet connected.

To use Realm with your small group, you will need a Realm login. The other members of your group do not have to have a Realm login, but they will not be able to access all of the group features if they don't. To set up your login, go to https://onrealm.org/GlenMarChurch and click "Sign Up." This is also where you will sign in to Realm. If you lose the link, you can find it on the My Glen Mar page of the website. If you need help, contact Realm@GlenMarUMC.org.

Realm Connect

Glen Mar Church Connect

When you log in to Realm in a browser on your computer, you'll be in "Connect" which is the part of Realm where church members can connect with the church and each other. You can access similar features in the Connect App, which you can install on your phone or tablet. These instructions are for Connect in a browser.

You can adjust your profile settings by clicking on your name in the upper right corner.

- **My Profile** – Edit your contact or personal information, manage your privacy
- **My Account** – Change your password or account email
- **Privacy** – Choose who can or cannot see your contact and personal information
- **Payment Methods** – Add or edit a credit card for giving or paying for events
- **Notifications** – Edit how you want to be notified about activity on your newsfeed and communication to your groups (default is to receive emails for all notifications)

The side menu in Connect helps you navigate between different ways to connect.

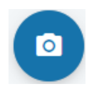
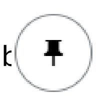
- **News** is a listing of things that have been posted to a "newsfeed" – both churchwide and within your groups or ministries. Most groups are set up so that anyone in the group can post to the newsfeed. Only Administrators can post to the churchwide group.
- **Communications** is where you can see emails and chats that you have created or received. You can also compose an email or chat message to your group. Only group leaders can send emails to the group.
- **Events** contains a listing of upcoming events, events you are registered for, and any spotlighted events. The My Events tab includes events that apply to you or are open to you. The All Events tab allows you to filter events (for example, see only the events for your group).
- **Giving** shows your personal giving history and allows you to manage your giving.
- **Groups** allows you to access groups you belong to or find a new group to join. Group members can see the group newsfeed, post to the newsfeed, see a list of group members, and access files posted to the group and information about the group. Group leaders have additional options like sending emails, marking attendance, and managing group members. The Find Groups tab shows all groups that are open and allows people to contact a group leader or request to join a group.
- **Serving** is where you can find serving opportunities, record your skills and interests, and note your serving availability. We are not currently using this part of Realm very much.
- **Directory** includes a listing of all Glen Mar congregants. You can search for a particular person with a few letters from their first and last name. Depending on your member status and an individual's privacy settings, you may or may not be able to send a chat message, see contact information, and see personal information (like birthdate) and group membership. Note that only Glen Mar members and regular attendees can see the directory, and personal information and children's profiles are hidden from non-members.

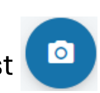
Communicating with Your Group

There are three ways to communicate with your group – emails, posts, and chats. Only group leaders can send email to the group. Most groups are set up so anyone can post to or chat with the group. Depending on their notification settings, group members may receive an email or phone notification when there's a new post to the group.

- **Sending an email** – There are two ways to send an email
  - Communications Tab
    - Choose Communications, then Inbox
    - Click on the Compose button 

    - Choose the group you wish to send an email to
    - Before clicking Send, set your Reply Options to Sender Only, Entire Group, or Disabled
  - Groups Tab
    - Choose Groups, then the group you want to email 

    - Click the Send Communication button
    - Click Compose Your Message
    - Before clicking Send, set your Reply Options to Sender Only, Entire Group, or Disabled
- **Posting to the group newsfeed** – You can create a post from the News tab or the Group tab. Depending on notification settings, group members may receive an email containing your post, but they cannot respond to it through email.
  - From the News tab
    - Click Start a Post  or Start a Photo Post 
    - Choose the group(s) you want to see your post
    - Upload a photo if you are creating a photo post
    - Compose your post
    - Choose to allow comments or not
    - Choose to send notifications or not
    - To keep your post at the top of the group newsfeed, click the pin b 
  - From the Group tab
    - Choose the group you want to see your post 

    - Click Send Communication
    - Under Post to Newsfeed, choose Create a Post or Create a Photo Post
    - Follow the above instructions
  - Posting if you are not a group leader
    - Group members can post to the group if the group settings allow it
    - From the News tab
      - Click Start a Post  or Start a Photo Post 
      - Follow the above instructions

        - From the Group tab
            - Choose the group you want to see your post
            - Click the Start a Post or Start a Photo Post button
            - Follow the above instructions

- **Starting a group or individual chat** – You can start a chat with your group, a subset of your group, or select individuals. Group members may also have these options (depending on group, member, and privacy settings). Chats do not appear in the newsfeed. Depending on notification settings, group members may receive an email containing your chat message, but they cannot respond to it through email.
    - From the Communications tab
        - Choose the Chat tab
        - Click the Start a New Chat button 
        - Start typing the name of the group or individual(s) you want to chat to
        - Type your message and hit Send
        - You can see a record of Chat messages you've sent and received in the Communications tab
    - From the Groups tab (only leaders can start a chat here)
        - Select the group you want to chat to
        - Click the Send Communication button
        - Choose Start a Chat Session
        - Send a message to the entire group or click "Message specific people" to choose who in the group to include

Manage Group Members

Group leaders can add and remove group members and edit profile details of group members (address, phone number, etc.). Group leaders can only add members who already have a Realm profile. Contact Realm@GlenMarUMC.org to add someone who is not already in Realm.

- **Viewing the list of group members**
  - In the Group tab, choose the group you wish to manage
  - Click on the Participants tab
  - Icons by each person's name indicate if they have an email address in their profile, if they have a Realm login, and if they receive mobile app notifications
  - If your group is set up for parental oversight, you can see a list of parents who receive group communication under the Parents/Guardians tab
- **Printing a group roster**
  

  - In the Participants tab, click Manage Participants
  - Click the printer button and choose Roster 
  - Choose details to include
  - Choose layout (portrait or landscape)
  - Choose File Format
    - PDF creates a document that can be printed or saved
    - CSV downloads a spreadsheet that can be converted to an Excel file
  - Click the Run button
    - PDF will be displayed and you can choose to print, save, or download
    - CSV will be downloaded
- **Adding someone to your group**
  - In the Participants tab, click Manage Participants
  - Click Add Person 

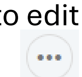
  - Type a few letters of the first and last name of the person you want to add
  - If they have a profile, their name will appear in a drop down box
  - Select the person you want to add
  - Choose to add them as a Member, Leader, or Guest and click Add 

  - Adding someone as a Guest allows for their attendance to be recorded without giving them group member permissions
- **Removing someone from your group**
  - In the Participants tab, click Manage Participants
  - Click on the three dots next to the name of the person to be removed •••
  - Choose Remove from Group
- **Changing someone's Participant Type** (Leader, Member, Guest)
  - In the Participants tab, click Manage Participants
  - Click on the three dots next to the name of the person
  - Choose Edit
  - Change Participant Type, then click Save

- **Updating a group member's information**
    - In the Participants tab, click on the name of the person to be updated
    - Click Edit Profile
    - Make sure you have permission to make any changes
    - Choose the Contact Information tab to update address, phone number, etc.
    - Choose the Personal Information tab to update date of birth, allergies, etc.
    - Click Save

Edit Group Details

Group leaders can update group details and settings like the group name and description, leader and member permissions, and visibility.

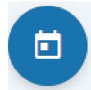
- In the Groups tab, choose the group you want to edit
- Click on the three dots next to the group name 
- Choose Group Settings
    - Basic – Edit group name, description, or type
    - Group Leaders – Add or remove leaders (note: removing someone as a leader does not remove them from the group)
    - Group Communication – Set permissions for posts, photos, events, and chats, enable parent/guardian oversight
    - Visibility – Set public visibility of the group for people looking to join
    - Recess Periods – Set breaks from Primary Event meetings (e.g. weekly meetings)
    - Social Media – Link to social media profiles
    - Participant Settings – Indicate gender, age, and marital status for prospective members, set membership limit
    - Participants Tab – Choose information to display on the Participants tab
- Your group description is visible to group members under the Info tab and to people outside your group in the Find Groups tab (next to Your Groups in the Group tab)
    - Information about when and where your group meets is automatically added if you have a Primary Event (see below)

Files

Files attached to newsfeed posts to your group are saved in the Files tab. Group members can then access them later without having to find the post.

Group Events

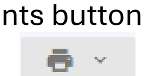
If the group set-up allows, leaders and members can create Group Events. Once you create a group event, it will appear in the Events list of group members, and attendance can be recorded.

- **Creating a Group Event**
    - In the News tab, select Start an Event 
    - Choose the group the event is for
    - Add a title and description
    - If desired, add a photo or image 
    - Set start and end times and recurrence if needed
    - Set location as In Person, Virtual, or both
        - If In Person, add a location if desired
        - If Virtual, add meeting link and password if desired
    - If desired, add items that group members can volunteer to bring
    - If desired, set as the groups primary event
        - This would be the main meeting time for the group, for example a weekly or monthly meeting
        - A group can only have one primary event at a time
        - The date and time of your primary event appears in the group description and the info tab
    - If desired, allow RSVPs
    - If desired, allow comments
    - If desired, send a notification to group members about the creation of the event (email or whatever notification preferences members have set)
    - Click Post
- **Editing an existing event**
    - In the Events tab, locate the event you want to edit and click on the name
        - Search by Event Name or
        - Click All Events or View All Upcoming Events
            - Filter by group, date, or RSVP
    - Click on the three dots and choose Edit
        - Edit a one-time event or all events in a recurring series
            - All details for future events can be changed
        - Edit a single event in a series of recurring events
            - Date, time, location, and any item to bring can be changed
    - To cancel an event, click on the three dots and choose Cancel
        - Canceling an event will automatically send a notification to group members and leaders
        - If you cancel a single event or a one-time event it will be listed as Canceled, and it can be reinstated if needed
        - If you cancel all future events of a recurring event, the upcoming events will be deleted

Attendance

Keeping track of attendance in your group helps you notice if someone is missing. It also helps you identify who your most active members are. In addition, it provides involvement information to church leadership and pastors, which can be used both for administration and for discerning how to best care for Glen Mar congregants. Attendance can be marked for any past group events.

- **Mark attendance for a group meeting**
    - In the Groups tab choose the group you want to mark attendance for
    - Click the Attendance tab
    - Choose the Event you want to mark attendance for
    - Check the box next to the names of people who were present
        - Hybrid meetings have an option for marking In-Person or Virtual attendance
    - Attendance is saved automatically, but can be corrected at any time by unchecking a name checking additional names
    - To add a new attendee, click Add Person
        - Search for an existing profile and select
        - Add as member, leader, or guest
        - If no profile is found, mark attendance using the Additional number
- **See attendance of group members**
    - Click on the Participants tab
    - Click on the Manage Participants button 

    - Depending on group settings, you can see when each person joined the group, when they last logged in to Realm, their birthdate, when they last attended the group, and their attendance percentage since joining the group
    - To see a list of dates someone attended, click on the attendance percentage next to their name
    - To see a list of participants and detailed attendance, follow the "Print attendance marking sheet" instructions below
- **Print an attendance marking sheet**
    - Click on the Participants tab
    - Click on the Manage Participants button
    - Click on the printer button 
    - Choose Attendance Marking Sheet
    - Choose dates and events to include
        - Choose future dates to create a marking sheet
        - Choose past dates to view past attendance
    - Choose layout (portrait or landscape) and additional information to include
    - Click the Run button
    - A PDF document will open and you can choose to print, save, or download