

People Dashboard User Guide

Updated: 07/12/2017

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PEOPLE DASHBOARD INTRODUCTION

The People Dashboard is a web-based feature that allows persons serving within the Iowa Annual Conference to update their contact information both in the conference database and on our conference website.

In addition, the dashboard gives you direct access to Charge Conference forms which have been assigned to you.

It is our expectation that every clergy person will use the dashboard so that the conference and district offices can have access to the most up-to-date information regarding you.

The pages that follow take you through a step-by-step process on how to use the People dashboard. If there are questions regarding the People dashboard that are not answered in this document, please contact Roland Minshall (roland.minshall@iaumc.org) in the conference office.

LOGGING IN TO THE PEOPLE DASHBOARD

There are three ways to access the login screen for the Local People dashboard.

Option 1

Visit your district's website (accessible through www.iaumc.org) and click on "People Dashboard" on the left-hand side of the screen.

The screenshot shows the Iowa Conference Central District website. On the left is a navigation menu with the following items: Iowa Conference Home, 2017 Charge Conferences, 2017 Professional Interviews, Apportionments, Church Dashboard, Church List/Map, Classifieds, Committees, Conference Calendar, District Asking, Downloads, Forms, Lay Servant Ministries, Missions, People, and People Dashboard. A red arrow points to the 'People Dashboard' link. The main content area features a 'WELCOME!' message with the tagline 'Hope made real. Faith, Fruit, Fire.' Below this are sections for 'DISTRICT NEWS' and 'CONFERENCE NEWS'. On the right side, there are sections for 'DISTRICT CALENDAR' and 'CONTACT' with staff information.

Option 2

Type <http://www.iaumc.org/peopledashboard> into the address bar of your web browser and go directly to the following screen.

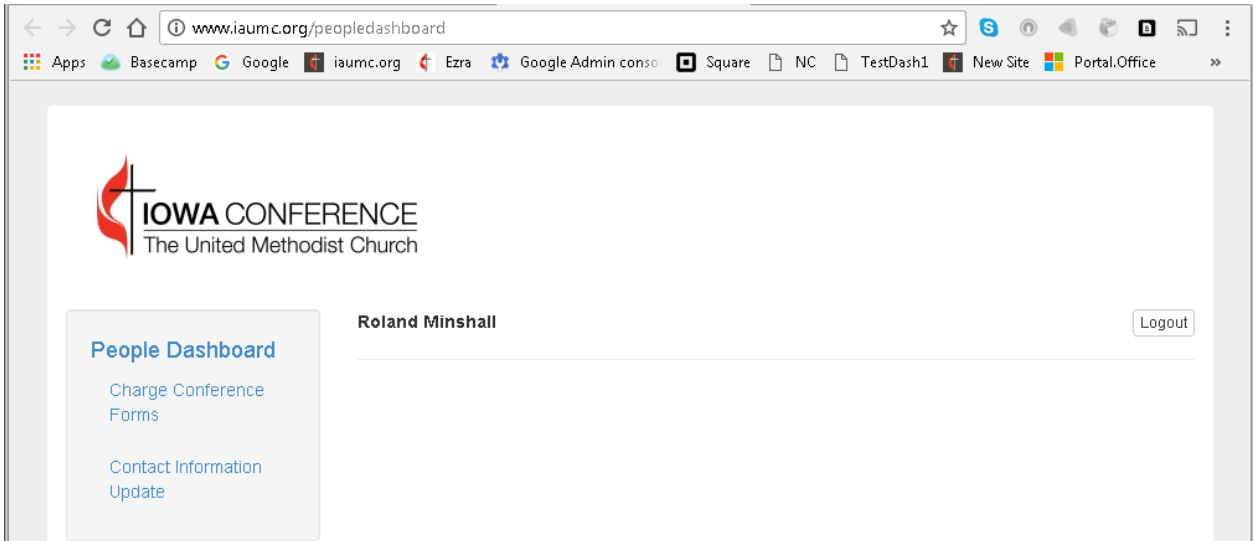
Option 3

You will be provided a link by your District Administrative Assistant which will take you directly to the page and automatically log you in. Please keep this link in a handy, easily accessible place for future reference.

For options 1 or 2 you will need a username and password, which may be obtained from your District Office.

'PEOPLE DASHBOARD' HOME PAGE

The People dashboard home page has links that will take you to each section of the dashboard. This manual will cover each of the sections. The sections are as follows:



Charge Conference Forms

Contact Information Update

Log Out - *Clicking on the Log Out link will log you out of the system and return you to the People Dashboard Login screen.*



People Dashboard

Charge Conference
Forms

Contact Information
Update

Roland Minshall

Logout

Contact Information Update

CONTACT INFORMATION UPDATE

This area allows you to update the information for your contact record in our database. Click on the “**Contact Information Update**” link, and then **again on the link in the middle** of the screen.

The following screen will display with the information we currently have in the database for you.

Click into any input box to make changes to that information. (See screen below).

There is a box at the bottom of the screen called a “CAPTCHA” which will verify that you are not an automated system trying to update information (see the “I am not a robot” section on the image below). This must be filled in before any changes will be saved.

Once you have made all of your changes click the “**Save**” button to save your changes.

To upload a Primary Image (current picture of yourself), click on the “Browse” button and navigate to the picture located on your computer. Click on the file name to highlight it and then click “open”. This will upload your picture to the website.

When entering information please do not use any punctuation. Phone numbers should be entered in the following format (xxx) xxx-xxxx. It is very important that you **do not** put words in the phone number field such as “call first”. Do not enter words in the phone number field even if you are indicating an extension. Just enter the phone number without the extension.

When you have finished updating your information, **click on “SAVE”**. The database will be updated and you will be returned to the People Dashboard page.

Login Credentials

This area is used to change the login information for your People Dashboard access.

The screenshot shows a web browser window with the URL www.iaumc.org/peopledashboard. The browser's address bar and tabs are visible at the top. The main content area features the Iowa Conference logo (a red flame) and the text "IOWA CONFERENCE The United Methodist Church". Below the logo, the user's name "Roland Minshall" is displayed. To the right of the name is a "Logout" button. On the left side, there is a "People Dashboard" sidebar with links for "Charge Conference Forms" and "Contact Information Update". The main content area is titled "Charge Conference Forms" and lists three links: "Central District - 2015 Professional Interviews (2) (Submitted 10/23/2015)", "Central District - 2015 Professional Interviews (Submitted 10/27/2015)", and "Central District - 2016 Professional Interviews (Submitted 08/24/2016)".

Charge Conference Forms

The Charge Conference Forms link will take you to a screen which will contain links to various FormVites which have been sent to you previously for Charge Conference Reports. Simply click the appropriate link for the forms you need to fill out. Please note: the current year's links may not have been provided yet and may therefore not show up here yet.

Beginning in 2017 this will be the only method for accessing the Charge Conference Forms links.

LOG-OUT

After you are finished working in the dashboard, click on "Logout" to exit the system.

