
Ezra Statistics Conference Admin User's Guide

A module of the Ezra
Data Management
System



FINANCE & ADMINISTRATION

General Council on Finance and Administration

THE UNITED METHODIST CHURCH

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CONFERENCE STATISTICS MODULE

SETTING UP A NEW YEAR

Conferences need to configure Ezra at the beginning of each year to begin accepting statistics.

1. Log in to the Ezra Stats module, go to **Admin Tools > Conference Settings**.

The screenshot shows the Ezra Stats module interface. At the top, there is a navigation bar with the following items: PROGRAMS, STATS HOME, CHURCH INFO, ENTER STATS, REPORTS, SUBMIT, ADMIN TOOLS, and ACCOUNT. The 'ADMIN TOOLS' dropdown menu is open, showing 'Conference Settings' (highlighted with a red box), Grand Total, Remittance, GCFA Table, and Table Design. Below the navigation bar, the main content area displays a welcome message: 'Welcome: Tilla Bradley' and 'Overview of Statistical Reports for FLORIDA Annual Conf'. A progress summary table shows: Not Started: 0%, In Progress: 0%, and Completed: 100%. Below this, there are three 3D pie charts representing the progress for Atlantic Central, East Central, and Gulf Central conferences, each showing 100% completion.

Category	Percentage
Not Started	0%
In Progress	0%
Completed	100%

Conference	Progress
ATLANTIC CENTRAL	100%
EAST CENTRAL	100%
GULF CENTRAL	100%

2. Scroll down to Mass Updates window, then click the **Create** button to setup a new year.

Mass Updates

Update Clicking this button will update your database based on the settings selected below.
*** The update feature has been locked because it is after the end of February. Running the update feature now can be risky. If you feel you need to run this update please contact Dale.*

Source: GCFA Records Database Ezra Appointments Database

Update Appointments

Update Churches
 Do Not Update Church Name Do Not Update Church Address

Update Pastors
 Do Not Update Pastor Name

Updated by Steve Loher on 11/22/2016

Update This will update all directions for all lines in the current year to match the GCFA directions.

Create Clicking this button will setup everything for 2017 based on your 2016 data.

3. Go to the Settings and Permission window and select the new year from the Default Stats Year dropdown box. Click **Save** to preserve the changes. Make sure that you are working in the new year in the header by checking the dropdown box.

The screenshot shows the Ezra Statistics Module Conference Admin's Guide interface. At the top, the Ezra logo and "DATA MANAGEMENT SYSTEM" are visible. The user is logged in as Tilla Bradley. The main heading is "2016 Statistics for the FLORIDA Annual Conference". A dropdown menu for "year" is open, showing options from 2006 to 2016, with 2017 selected. Below the main heading, there is a navigation bar with links for PROGRAMS, STATS HOME, CH, INFO, ENTER STATS, REPORTS, SUBMIT, ADMIN TOOLS, and ACCOUNT. The "Settings and Permissions" window is open, showing a "Default Stats Year" dropdown set to 2014, an "Entry Cutoff Date" dropdown set to 2017, and checkboxes for "Allow districts to" with 2016 selected and 2014 checked.

Line	Function	
Default Stats Year	The default year is the year that the system will automatically default to. Change to the current year when setting up a new year.	
Entry Cutoff Date	The entry cutoff date is the date that churches should have their statistics in by. Make sure to update the date when setting up the new year.	
District Permissions		
	Add and Edit Church Information	Allows the district users to update the church information in the Statistics module as needed. This will not update the information in the conference database or Ezra.
	Edit Church Tables	Allows district users to overwrite values entered by churches in the tables.
	Add, Edit, Delete users	Allows district users to create and remove users for their churches, change passwords, and unlock users.
Church Permissions		
	View other churches' information	Allows church-level users to run reports comparing the statistical information of other churches in the conference.
	View disabled lines	Allows church-level users to view the lines that the conference has disabled because it is supplying the information for those lines.
	Hide Grand Total	If selected, the Grand Total line is hidden even if the conference chooses to allow churches to view other disabled lines.
District Office contact		Directs users to contact the district office for help.
Warning explanation required		This requires churches to explain all warnings before submitting their statistics.
Administration link		This sets the default administration link to contact the conference office instead of GCFA. (Note: All technical questions or concerns will go directly to GCFA's helpdesk.)
Enter EIN		This requires the church to enter its EIN (in the correct xx-xxxxxxx format) before submitting its statistics.
Verifying the church statistics		This allows the church statistics to be marked as verified by a district or conference user.
Marking the statistics as verified		This allows the districts to mark churches as verified
Show directions		This displays the line directions on the table pages.

Message to Users

The message box allows the conference to create a message formatted in HTML that will be visible to all users when they log in.

2. Click the **Save** button to save the settings. To leave the page, click the **Exit** button. Tables can be secured by clicking the **Lock Tables** button.

Conference Functions

Your churches are NOT locked.

Lock Tables Clicking this button will lock all the churches in your conference.

Once a new year is created, churches are NOT LOCKED out of their tables by default. This button allows the user to lock the churches out of the system until all of the tables are setup and the users are generated. If the churches are not locked, they will be able to navigate and make changes to the current statistical year setup.

3. The database can be updated from this page. Select the information that you wish to update, then click **Update** button. A time stamp will appear to show the date and user who last ran a church update.

Mass Updates

Clicking this button will update your database based on the settings selected below.

Source: GCFA Records Database Ezra Appointments Database

Update Appointments

Update Churches

Do Not Update Church Name Do Not Update Church Address

Update Pastors

Do Not Update Pastor Name

Updated by Demo User on 10/06/2016

This will update all directions for all lines in the current year to match the GCFA directions.

Clicking this button will setup everything for 2017 based on your 2016 data.
*** 2017 has been setup.*

- “GCFA Record Database” refers to conferences that are not currently syncing their information to GCFA’s database.
- “Ezra Appointments Database” refers to the conferences that are currently syncing with GCFA.
- When selecting what to update, please note that this process will removed the churches closed the previous year while adding the churches that were opened.

4. After clicking the **Update** button, a summary of the changes will display in the window.

Mass Updates

Update

If you redistricted, we **highly** recommend you recreate your church users. Do not forget to create district users for your new districts.

Clicking this button will update your database based on the settings selected below.

Source: GCFA Records Database Ezra Appointments Database

Update Appointments

Update Churches

Do Not Update Church Name
 Do Not Update Church Address

Update Pastors

Do Not Update Pastor Name

Updated by Lauren Arieux on 09/25/2017

Update Summary

Churches Added: 0	Churches Updated: 2
Church Names Updated: 2	Church Addresses Updated: 2
Districts Added: 0	Districts Updated: 0
Pastors Added: 18	Pastors Updated: 2
Pastors Names Updated: 3	Pastors Addresses Updated: 0
Appointments Before: 785	Appointments After: 786


Update

This will update all directions for all lines in the current year to match the GCFA directions.

Create

Clicking this button will setup everything for 2018 based on your 2017 data.

** 2018 cannot be setup until next year.



Ezra
DATA MANAGEMENT SYSTEM

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- Run the Church Listing with Pastors report to review the active churches. Compare with the previous year if necessary to make sure all of the necessary churches are included in Stats module.

Statistical Reports

Conference Reports	
Statistics Reports and Forms	Instructions and Guides
Individual Church Stats Report Blank Church Input Form District Summary Stats Report Conference Summary Stats Report Conference Stats Spreadsheet GCFA Stats Spreadsheet (GCFA Lines) GCFA Conference Summary (GCFA Lines) Stats History Custom Export	Quick Tutorials (Videos) Conference Users Guide What's New in 2016?
Helpful Lists	Reports for the Submission Process
Church Listing with Pastors Pastor Listing with Churches System Users "Do Not Report" Churches GCFA Stats Report Line Codes with Descriptions Table Directions - All Lines	Submit Status Report Closed/Merged Churches Warning Report Error/Integrity Report Submit Comments Validations Fund Listing with Assignment Codes Stats Verified Report

MASS CREATE CHURCH USERS

To create automatic logins for your church users, make your selections below, then click the **Create Users** button.

Generate All Church Users

This page will allow you to generate users for all of your active churches and grant them access to the Statistics program. Just set the options below and click the Create Users button.

NOTE: This will remove all your current church users to create the new ones.

1. Do you want your churches to be able to create additional users for their church?

No Yes

2. Select the number to use for the default starting username.

General Church Number
 Local Church Number (aka Alignment Number)

3. How many users would you like to create for each church?

One user per church.
 Two users per church.

4. Choose default starting password for each user. (The user will be asked to change their password when they log in for the first time.)

[Create Users](#)

- If you choose to create two users per church, one will have an “o” (for office) and one with a “p” (for pastor).
- Run the “System Users” report to find a list of all system users. When churches log in for the first time, they will register with their names and contact information, which will be included in this report.
- The Mass Creating Users process deletes all current church users and replaces them with new users. You can run this process more than once, but keep in mind that it will delete whatever is in there (and delete any information for users who have already registered). If extra churches are added after users have been created, use “Create Account” to add them individually.

UPDATING USER’S PERMISSIONS

1. Log in to Ezra, then go to **Edit Account**.

The screenshot displays the Ezra Data Management System interface. At the top, the Ezra logo is on the left, followed by the user name 'Hello Tilla Bradley' and the title 'General Council on Finance and Administration'. A 'Logout' button is located in the top right corner. A navigation menu is open under the 'ACCOUNT' section, showing the following options: 'Change Your Contact Information', 'Change Your Password', 'Create Account', and 'Edit Account'. The 'Edit Account' option is highlighted with a red box. Below the menu are icons for 'Churches', 'People', 'Leadership', 'Export Lists', and 'Statistics'.

2. Search for the user using his name, email address, or assigned role.

Search Criteria

User Level: Conference District Church

Conference: District:

Username: Email:

First Name Last Name

Roles / Permissions:

3. Click the **Edit Assignments** hyperlink.

Search Results	User Details	
Church User	<p>Username: fichurch</p> <p>FirstName: <input type="text" value="Church"/></p> <p>HomePhone: <input type="text"/></p> <p>Level: <input type="text" value="Church"/></p> <p>IsFirstLogin: <input type="text" value="False"/></p> <p>Type: <input type="text" value="Standard"/></p>	<p>Email: <input type="text" value="dowens@gcfa.org"/></p> <p>LastName: <input type="text" value="User"/></p> <p>WorkPhone: <input type="text"/></p> <p>Conference: <input type="text" value="Florida (751)"/></p> <p>ResetPassword: <input type="text" value="False"/></p> <p>User Note: <input type="text"/></p>
	<div style="border: 1px solid black; padding: 5px;"> <p>Stats Values:</p> <p>AccessingConfNo: <input type="text" value="Florida (751)"/> CanSelectConference: <input type="text" value="False"/></p> <p>AccessingDistNo: <input type="text"/> CanSelectConfGCFAView: <input type="text" value="False"/></p> <p>AccessingChurchNo: <input type="text" value="356094"/> View: <input type="text" value="Conf"/></p> <p>Year: <input type="text" value="2017"/></p> <p>Conn String: data source=AppSQLStage;initial catalog=Conf_751;persist security info=False;user id=AppSQLStage;password=Appw4SQL2Stage;packet size=4096;Max Pool Size=200</p> </div>	
	<p>Assignments: Edit Assignments</p> <p>Program Access: Edit Program Access</p> <p style="font-size: small; margin-left: 20px;">Central Database (Church Maintenance) Statistics (Can Create Users)</p> <p style="text-align: right;"> <input type="button" value="Unlock User"/> <input type="button" value="Delete User"/> <input type="button" value="Set Password"/> <input type="button" value="Save"/> </p>	

4. When the Set User's Assignments window opens, select the desired church or churches from the dropdown menu.

Set User's Assignments

Select the church you need to assign to this user from the list below.

Select Church:

Current Assignments:

- Select Church
- 352030 Adullam Worship Center - Seffner in Seffner, FL
- 350394 Albright - St Petersburg in St Petersburg, FL
- 354745 Altoona in Altoona, FL
- 352520 Alturas in ALTURAS, FL
- 351321 Arlington - Jacksonville in Jacksonville, FL
- 352586 Asbury - Bartow in Bartow, FL
- 952776 Asbury - Jacksonville in JACKSONVILLE, FL

Login History:

- When finished, click the **Set Assignments** button.

Set User's Assignments

Select the church you need to assign to this user from the list below.

Select Church:

Current Assignments:

- The updated assignments will show on the page. Click the **Save** button to save the changes.

User Details

Username:	<input type="text" value="flchurch"/>	Email:	<input type="text" value="dowens@gcfa.org"/>
FirstName:	<input type="text" value="Church"/>	LastName:	<input type="text" value="User"/>
HomePhone:	<input type="text"/>	WorkPhone:	<input type="text"/>
Level:	<input type="text" value="Church"/>	Conference:	<input type="text" value="Florida (751)"/>
IsFirstLogin:	<input type="text" value="False"/>	ResetPassword:	<input type="text" value="False"/>
Type:	<input type="text" value="Standard"/>	User Note:	<input type="text"/>

Stats Values:

AccessingConfNo: <input type="text" value="Florida (751)"/>	CanSelectConference: <input type="text" value="False"/>
AccessingDistNo: <input type="text"/>	CanSelectConfGCFView: <input type="text" value="False"/>
AccessingChurchNo: <input type="text" value="356094"/>	View: <input type="text" value="Conf"/>
Year: <input type="text" value="2017"/>	
Conn String: data source=AppSQLStage;initial catalog=Conf_751;persist security info=False;user id=AppSQLStage;password=Appw4SQL2Stage;packet size=4096;Max Pool Size=200	

Assignments: [Edit Assignments](#)
 352586 Asbury - Bartow in Bartow, FL in 43 GULF CENTRAL District

Program Access: [Edit Program Access](#)
 Central Database (Church Maintenance) **Statistics** (Can Create Users)

Refer to the following table to make changes or updates to the User Details section.

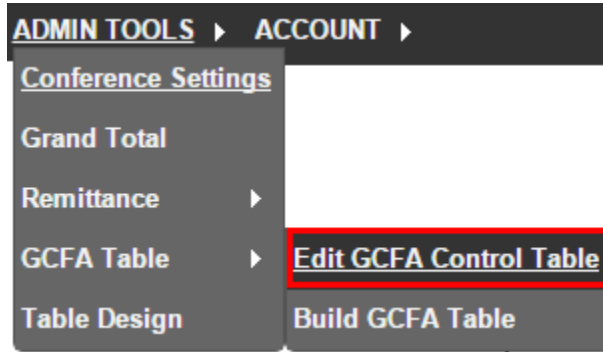
User Details Window	
Username	The assigned user name for the account.
First name	The user's first name
Home Phone	The home phone number for the user.
Level	The user's assigned access level.
Is First Login	States if this is the first time the user has logged in. <ul style="list-style-type: none"> • False – No • True - Yes
Type	The type of account access the user is assigned.
Email	The user's email address
Last Name	The user's last name.
Work Phone	The work phone number for the user
Conference	The conference the user belongs to. (This cannot be changed or modified.)
Reset Password	Allows the administrator to reset the user's password. <ul style="list-style-type: none"> • False – No • True - Yes
User Note	Any notes about the user for the administrator's reference.

GCFA TABLE

The GCFA Control Table is the default table that is automatically created in the new year, allowing the conference to designate the values reported in customized lines into GCFA's lines. It can be edited by doing the following:

EDIT GCFA CONTROL TABLE

1. To edit the GCFA Control Table, go to Admin Tools > GCFA Table > Edit GCFA Control Table.



2. The **GCFA Control Table** page contains a panel to review selected lines and a full list of all the lines that comprise the control table.

GCFA Control Table

Line #	Code	Description
GCFA Lines Not Assigned		
All lines are assigned		

Summary of Conference Lines to GCFA Lines

Conf. Line#	Conf. Code	Description	Percent	GCFA Line#	Description	GCFA Code
1	MEMBPREV	Total professing members reported at the close of last year	100	1	Total professing members reported at the close of last year	MEMBPREV
2.a	RECPROF	Received this year on Profession of Christian Faith	100	2.a	Received this year on Profession of Christian Faith	RECPROF
2.b	RECREST	Restored by affirmation	100	2.b	Restored by affirmation	RECREST
2.c	RECCOR	Correct previous year's reporting errors of total professing membership numbers by addition	100	2.c	Correct previous year's reporting errors of total professing membership numbers by addition	RECCOR

3. Select a line to review by selecting from the dropdown in the **Line #** box.

GCFA Control Table

Line #	Code	Description
1.....	002.....	How many church members regularly participate in church community outreach programs?
2.....	001.....	This line will track the number of member who self-identify as members of the local community.
3.....	457.....	How many children (5-17) regularly participate in community outreach programs
1.....	MEMBPREV.....	Total professing members reported at the close of last year
2.a.....	RECPROF.....	Received this year on Profession of Christian Faith
2.b.....	RECREST.....	Restored by affirmation
2.c.....	RECCOR.....	Correct previous year's reporting errors of total professing membership numbers by addition
3.....	RECUMC.....	Transferred in from other United Methodist churches
4.....	RECOTH.....	Transferred in from non-United Methodist churches
5.a.....	REMCHR.....	Removed by Charge Conference action
5.b.....	REMWITH.....	Withdrawn from Professing Membership
5.c.....	REMCOR.....	Correct previous year's reporting errors of total professing membership numbers by subtraction
6.....	REUMC.....	Transferred out to other United Methodist churches
7.....	REMOTH.....	Transferred out to non-United Methodist churches
8.....	REMDEATH.....	Removed by death
9.....	MEMBTOT.....	Total professing members reported at the close of this year
9.a.....	MEMBA.....	Asian
9.b.....	MEMBAA/B.....	African American/Black
9.c.....	MEMBH.....	Hispanic/Latino

4. The selected line will appear on the panel.

Line #	Code	Description	Conf. Code	GCFA Code	Percent
1.....	MEMBPREV.....	Total professing members repr			
GCFA Lines Not Assigned			MEMBPREV	MEMBPREV	100

ASSIGNING A LINE

1. To assign a line, select the line in the Line # dropdown. Click the **Add Assignment** button.

Line #	Code	Description
1.....	002.....	How many church members regularly

Add Assignment

GCFA Lines Not Assigned
All lines are assigned

2. When the **Add a Line Assignment** window opens, select the table line that you need to have the line added to and enter the percent that you want to add to the line, then click the **Submit** button.

Add A Line Assignment

GCFA Table Lines
13..... CONSTIT..... Number of other constituents of tl

Percent to Assign:
75

Submit Cancel

Selected Line Description:
Number of other constituents of the church

- The changes will display in a table on the panel.

Line #	Code	Description	Add Assignment		
1.....	002.....	How many church members regularly			
GCFA Lines Not Assigned			Conf. Code	GCFA Code	Percent
All lines are assigned			Edit Delete	002	CONSTIT 75

BUILD GCFA TABLE

- Go to **Admin Tools > GCFA Table > Build GCFA Table**. Click the **Build GCFA Table** button to build a new table when submitting your statistics to GCFA.

Build GCFA Data Table

This is where you build the statistical table that will be submitted to GCFA. By clicking on the button below, you will build this table and then be able to see the data using the reports below. This will NOT submit the data to GCFA. Please go to the submit area to do this.

Roll Up Child/Satellite Church Numbers into Parent Church.

Last built by Steve Loher on 09/07/2017

[Build GCFA Table](#)

REPORTS

[GCFA Stats Spreadsheet](#) This will allow you to export and see all the data that will be sent to GCFA.

[Conference Summary](#) This will allow you to export summary values for all the data that will ne sent to GCFA.

Note: Selecting **Roll Up Child/Satellite Church Numbers into Parent Church** will do just that – sum all churches in a parent/child relationship so that just the totals are submitted to GCFA via the Parent church. This allows the conference to keep separate data on satellites or campus churches while sending GCFA only the summed up values.

- Once you click the “Build GCFA Table” button, a confirmation window opens to confirm that that data has been copied successfully. Click the **OK** button.

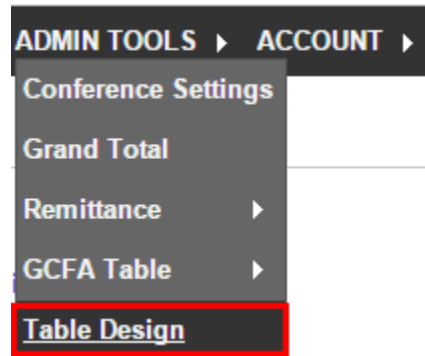
The page at ezra.gcfa.org says:

Data has been built successfully

[OK](#)

TABLE DESIGN

To access Table Design, go to **Admin Tools > Table Design**. This page allows the user to edit or create customized tables for data collection



ADDING TABLES

1. Add tables on an “as needed” basis. To create a new table, go to **Admin Tool > Table Design**. Click on the **Add/Edit** Table hyperlink to add a table.

Edit Table Design

Table 1

Active Lines Only

[New Line](#)

Edit	Line #	Code	Description	Sort Order	Enabled?	Active?	Validations?
Quick Edit Full Edit	1	MEMBPREV	Total professing members reported at the close of last year	001.0	Yes	Active	No
Quick Edit Full Edit	2.a	RECPROF	Received this year on Profession of Christian Faith	002.1	Yes	Active	No

- When the **Add Table** window opens, fill in the **Table Name**, **Table Title**, and **Table Description**. Click the **Add** button when finished.

Name	Description	Title	Status	Req.
Select Table 1	Table 1	MEMBERSHIP & PARTICIPATION	Active	Yes
Select Table 2	Table 2	CHURCH ASSETS & EXPENSES	Active	Yes
Select Table 3	Table 3	CHURCH INCOME	Active	Yes

Show Closed Tables

Table Name:

Table Title:

Table Description:

Required: Is the church required to save this table prior to submitting their stats?

Status:

* To edit an existing table, select the table above, make your changes then click UPDATE.
 * To add a new table click CLEAR below remove any info from the fields, enter the new information and click ADD.

[Close](#)

- The newly created table will be available for selection in the dropdown box. Use the arrows to rearrange the order of tables.
- To edit a table's name, status, or requirements, click **Select** to the left of the table, make your changes, and then click **Update**.

Test
 Table 1
 Table 2
 Table 3
Test

[Add/Edit Tables](#)

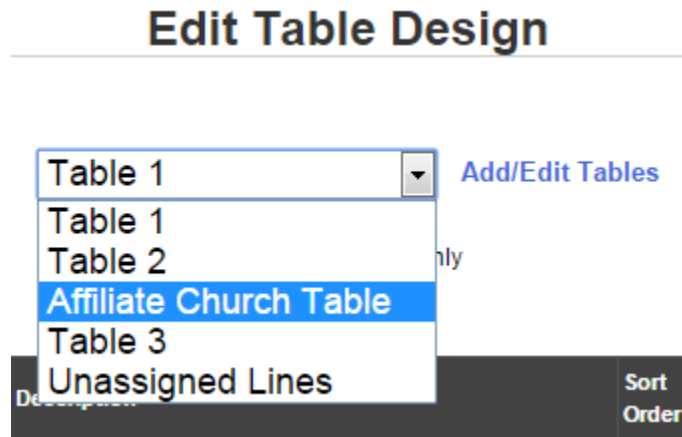
Only

[New Line](#)

Edit	Line #	Code	Descr	Sort Order	Enabled?	Active?	Validations?
Quick Edit Full Edit	1	002	How many church members regularly participate in church community outreach programs?	1	Yes	Active	No
Quick Edit Full Edit	2	001	This line will track the number of member who self-identify as members of the local community.	2	Yes	Active	No
Quick Edit Full Edit	3	457	How many children (5-17) regularly participate in community outreach programs	3	Yes	Active	No
Unassigned Lines							

EDITING TABLE LINES

To edit a table, select the desired table from the dropdown box.



When the table opens, each row provides the options for a **Quick Edit** and a **Full Edit**.

QUICK EDIT

1. Click on the **Quick Edit** hyperlink to edit the line number, description, and/or sort order without opening the full Line Edit Dialog Box.

Quick Edit	62.a-	TtlGenSpSu	Received for annual budget/spending plan	062.0	Yes	Active	No
Full Edit	62.g						

2. When the row becomes editable, make the desired changes, then click the **Update** hyperlink.

Update	62.a-	TtlGenSpSu	Received for annual budget/spending plan	062.0	Yes	Active	No
Cancel							

FULL EDIT

1. Click on the **Full Edit** hyperlink.

Edit	Line #	Code	Description	Sort Order	Enabled?	Active?	Validations?
Quick Edit	31	VALPROP	Market value of church-owned land, buildings and equipment	031.0	Yes	Active	No
Full Edit							

- When the **Edit Table Line** page opens, make the desired changes to the line, then click the **Update** button.

Basic Information

Description:

Code:

Sort Order:

Line #:

Table #:

Active: * Closed lines are no longer used.

Enabled: * Disabled lines remain active, but do not show on tables.

Min Value Allowed: * A warning will alert the user if they input a value below this number.

Max Value Allowed: * A warning will alert the user if they input a value above this number.

Give Warning: %
A warning will alert the user if they input a value that is greater than or less than the previous year's value by this percentage.

Required: If checked, this line must have a value greater than 0 or it will cause an error.

Title Line: Checking this will mark this line as a title line. Title Lines are purely informational lines and do not collect data.

Apportionment Field:

Directions:

Line	Function
Description	The description is the text that will appear on the table and describes the purpose or function of the line.
Code	The line is identified with this code, and it cannot be modified after it is saved (and all GCFA lines cannot be modified). There is a maximum character length of 10 characters, letters and number only, and the first character cannot be a number.
Sort Order	This number defines where the line is placed in the table.
Line #	This number is the one assigned to the line. It does not determine sort order.
Table #	Select the table that the line will be added to from the dropdown menu.
Active	Select from the dropdown menu whether or not the line is active or closed.
Enabled	Select No to disable the line, ensuring that only conference (or district, if allowed) users can edit the line.
Min Value Allowed	Set a minimum numerical value that must be used in the line. If the value entered is below the entered number, a warning will alert the user.
Max Value Allowed	Sets a maximum numerical value that must be used in the line. If the value entered is above the entered number, a warning will alert the user.

Give Warning	Sets a warning if the user enters a value that is greater or less than the previous year's value by the entered percentage.
Required	Make the line a required entry that must be filled out. If the line is required and left blank, an error will generate.
Title Line	Marks the line as a title line that does not collect data. All characters are bolded and in a larger font.
Apportionment Field	Marks the line as a field that will be used to calculate apportionments (information only for church users).
Directions	Enter text directions on how to correctly enter values for the line. Directions on a title line are shown not bolded and in a smaller font.

Example of a title line with directions:

Membership Gender
 On the following lines, report for each member the gender with which she or he identifies. The total of the numbers entered in these two spaces must equal the membership total in Line 4.

Linking a line means that when the value put into the line currently being edited/created is saved, the value will also show up in the designated linked line (rendering that line disabled for editing by the church user). The linked line MUST be in another table, as the value is not linked until the table is saved.

Linked Line

If a line is marked as a "Linked Line" for this line, then any value saved for this line will also be saved for the "Linked Line".

Select Linked Line:

3. Select the desired line from the dropdown menu.

Linked Line

If a line is marked as a "Linked Line" for this line, then any value saved for this line will also be saved for the "Linked Line".

Select Linked Line:

Add Validation Rule

Line #:

Example: a + b + c = d

Formula:

Auto Sum: Checked

Custom Error Message:

Formula	Error Message	Auto Sum
9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9	Total of Ethnic fields does not equal total members.	False
9.h + 9.i = 9	Males + Females does not equal total members.	False
1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9	Previous members + recieved - removed does not equal total members.	True

- After selecting the line, click the **Save** button.

Linked Line

If a line is marked as a "Linked Line" for this line, then any value saved for this line will also be saved for the "Linked Line".

Select Linked Line: 1 Total professing members reported at the close o... Save

VALIDATION RULES

- Select the **Add Validation Rule** checkbox.

Validations/Auto Sum

Add Validation Rule

Line #: Operator:

Example: $a + b + c = d$

Formula:

Auto Sum: Check here to auto sum this field using this rule.

Custom Error Message:

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

- Select the first line number that you want to use from the dropdown menu.

10

25.b

26.b

9

Validations/Auto Sum

Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #: 9.a Operator:

Example: $a + b + c = d$ Back Cancel Add Rule

Formula:

Auto Sum: Check here to auto sum this field using this rule.

Custom Error Message:

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

3. Choose an operator function from the dropdown menu.

Validations/Auto Sum

Add Validation Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #:

Operator:

Example: $a + b + c = d$

Formula: 9

Auto Sum: Check here to auto sum this field using this rule.

Custom Error Message:

is greater than
is less than
is greater than or equal to
is less than or equal to
=

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

4. Choose another line from the dropdown menu.

Validations/Auto Sum

Add Validation Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #:

Operator:

Example: $a + b + c = d$

Formula: 9 +

Auto Sum: Check here to auto sum this field using this rule.

Custom Error Message:

Back Cancel Add Rule

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

5. Choose an operator function from the dropdown menu.

Validations/Auto Sum

Add Validation Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #:

Operator:

Example: $a + b + c = d$

Formula: 9 + 12

Auto Sum: Check here to auto sum this field using this rule.

Custom Error Message:

is greater than
is less than
is greater than or equal to
is less than or equal to
=

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

- Review the formula that was created and make changes as needed using the dropdown boxes. The formula must end with the equal (=) operator. (It will equal the current line being edited/created.)

Validations/Auto Sum

Add Validation Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #: Operator:

Example: $a + b + c = d$

Formula: 9 + 12

Auto Sum: [Check here to auto sum this field using this rule.](#)

Custom Error Message:

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

- If you want the total to automatically generate a sum, select the **Auto-Sum** checkbox.

Validations/Auto Sum

Add Validation Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #: Operator:

Example: $a + b + c = d$

Formula: 9 + 12

Auto Sum: [Check here to auto sum this field using this rule.](#)

Custom Error Message:

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

- When finished creating the validation rule, click the **Add Rule** button.

Validations/Auto Sum

Add Validation Rule **** Use the 3 buttons below to add/edit this validation. You must finish before moving on.**

Line #: Operator:

Example: $a + b + c = d$

Formula: 9 + 12 = 9

Auto Sum: [Check here to auto sum this field using this rule.](#)

Custom Error Message:

	No.	Formula	Error Message	Auto Sum
Delete Select	2	$9.a + 9.b + 9.c + 9.d + 9.e + 9.f + 9.g = 9$	Total of Ethnic fields does not equal total members.	False
Delete Select	3	$9.h + 9.i = 9$	Males + Females does not equal total members.	False
Delete Select	1	$1 + 2.a + 2.b + 2.c + 3 + 4 - 5.a - 5.b - 5.c - 6 - 7 - 8 = 9$	Previous members + recieved - removed does not equal total members.	True

ENTER STATS

The “Select a Church” dropdown box returns a list of churches in alphabetical format. Simply click on the name of the church you wish to edit to bring up its tables. You can also search for a church by typing in its Alignment Number or General Church Number and clicking “Go.”

ENTERING STATISTICS

1. Select the year for the statistics that you are entering from the dropdown box.

2017

2016

2015

2014

2013

2012

2011

2010

2009

2008

2007

2006

2005

2004

2003

2002

2001

2000

1999

1998

Table 1 - MEMBERSHIP & PARTICIPATION

Menu

FAQ

User's Guide

Blank Report Forms

Reports

Need help?
If you have questions,
please contact your district
office.

2. Select the desired table from the dropdown box. The church’s alignment number and GCNO will automatically prepopulate.

Tables:

Table 1 - MEMBERSHIP & PARTICIPATION

Table 1 - MEMBERSHIP & PARTICIPATION

Table 2 - CHURCH ASSETS & EXPENSES

Table 3 - CHURCH INCOME

Test - Social Justice Metrics

Your statistical information was due on 3/06/30/2017. Please finish with your statistics as soon as possible.

Select A Church

732501 WEST SIDE

45201

Go

General Church Number

732501

Go

Status: Not Submitted

Not Saved

Verified By: Not Yet Verified

Federated churches, community churches, etc., report only that part of the membership belonging to The United Methodist Church.

- As you fill out the table the lines will reflect any errors or concerns. Refer to the color guide for the color-coded issues. Make sure to save your work as you go.

Line #	Description	2012 Value	2013 Value	Line #	
1	Total professing members reported at the close of last year	171	166	1	?
2.a	Received this year on Profession of Christian Faith	2	3	2.a	?
2.b	Restored by affirmation	1	3	2.b	?
2.c	Correct previous year's reporting errors of total professing membership numbers by addition	0	0	2.c	?
3	Transferred in from other United Methodist churches	0	0	3	?
4	Transferred in from non-United Methodist churches	0	0	4	?
5.a	Removed by Charge Conference action	0	0	5.a	?
5.b	Withdrawn from Professing Membership	0	3	5.b	?
5.c	Correct previous year's reporting errors of total professing membership numbers by subtraction	0	0	5.c	?
6	Transferred out to other United Methodist churches	0	3	6	?
7	Transferred out to non-United Methodist churches	7	3	7	?
8	Removed by death	1	3	8	?
9	Total professing members reported at the close of this year	166	160	9	?

Note: Lines imported from the Conference or Auto-Total can only be changed by conference (or district, if allowed) users. Any user can edit/overwrite values from VitalSigns.

Note: Conference (or district, if allowed) users do not have to unsubmit a church in order to edit and save changes. These users can overwrite any information in tables besides autosums and linked lines.

- If reviewing the church statistics for verification purposes, select the **Verified** checkbox after completing the review, then click the **Save** button.

Tables: Table 1 - MEMBERSHIP & PARTICIPATION

Your statistical information was due on 3/15/2013. Please finish with your statistics as soon as possible.

Select A Church: Alignment Number: General Church Number:

Status: Not Submitted Show All Active Lines **Verified**

Not Saved **Verified By:** Not Yet Verified

Federated churches, community churches, etc., report only that part of the membership belonging to The United Methodist Church.

SUBMITTING/UNSUBMITTING CHURCHES

As stated previously, conference (or district, if allowed) users do not have to unsubmit a church in order to edit and save changes and can overwrite any information in tables besides autosums and linked lines. However, because churches are locked out once they submit, there are instances in which they may need to be unsubmitted in order to make changes. In addition, because there may be valid reasons that a church cannot correct an error, which would block them from submitting, the conference or district may need to submit on the church's behalf. All of this can be done by selecting "Submit Church Stats" or "Unsubmit Church Stats" under SUBMIT.

1. To submit a church, go to the **Submit Church Stats** page. Any churches that have saved all three tables but not submitted will show in the list. Deselect "Select All," select the church to submit, and click **Submit Statistics**. If you wish to submit any church that has saved all tables at once, leave **Select All** checked.

Note: Any churches that are designated as Mission, New Church Start, or Satellites only need to have Table 1 saved in order to submit or show up in this list.

This page allows you to submit the statistical data for any church where data has been saved in all three of the main tables, but not submitted to the conference.

* Mission churches, New Church Starts and Satellites are only required to save Table 1.

Select All

736565 BARDWELL

Submit Statistics

Uncheck 'Select All' to make individual selections.

To select/deselect multiple churches use Ctrl+Click.

2. To unsubmit any churches that have submitted, go to the "Unsubmit Church Stats" page. Any churches that have submitted will appear on the list. Use the same process as submitting churches to select the churches you wish to unsubmit.

CHURCH INFO

Church Information allows the user to directly review and edit church information and appointments. Note that any changes made here DO NOT affect changes in the conference or GCFA database. Churches in the Stats Module are static for the selected year.

METROPOLITAN

District: SOUTHERN
Charge: CROSSLAKE

[Edit Church Info](#)

Type: Church Mission Church
GCNO: 736758 New Church Start
AlignNo: 45302 Do not report stats to Conference
Ethnicity: White Do not report stats to GCFA
EIDN: __-____ Tables Locked
Status: Active

2013 Stats There are no statistics saved for this church.

Address:

696 Interstate Dr.
Springfield, TN 75119-0000

Name	Code	Position		
Larry Jinks	05	Pastor	Edit	Delete
Ms Buena Rankin	50		Edit	Delete

[New Appointment](#)

EDITING CHURCH INFORMATION

The user has the option of creating a new church, editing the selected church's information, modifying the church leadership, or assigning a new appointment. This information is collected and stored in the Stats Module only to reflect a snapshot of the church as it was when stats were being reported. Editing information here DOES NOT change the church's official record.

CREATING A NEW CHURCH

1. Click the **New Church** hyperlink.

The screenshot shows a web form for creating a new church. At the top right, a button labeled "New Church" is highlighted with a red box. The form contains several input fields and dropdown menus: "Church Name", "Charge Name", "District" (with a dropdown menu showing "-- Select District --"), "GCNO", "Local Number", and "Status" (with a dropdown menu showing "All"). At the bottom, there is a search bar containing the text "METROPOLITAN ~ SOUTHERN" and two buttons labeled "Search" and "Reset".

- When the **Add New Church** window opens, enter the relevant information.

- The new church will appear on the panel with a temporary GCNO. Contact the GCFA statistician to have a valid GCNO added to the church if needed.

UMC of Bells Hollow

District: SOUTHERN

[Edit Church Info](#)

Charge: WEST SIDE

Type: Church

Mission Church

GCNO: T00006

New Church Start

AlignNo: 36912

Do not report stats to Conference

Ethnicity: Asian

Do not report stats to GCFA

EIDN:

Tables Locked

Status: Active

2013 Stats There are no statistics saved for this church.

This church does not have a valid GCNO and it does not have stats for this year. You can delete this church.

[Delete](#)

Address: 100 Main Street

Franklin, DC 20002

[No Current Appointments](#)

[New Appointment](#)

ADDING NEW APPOINTMENTS

There are instances in which the conference may want to edit the appointment associated with the church. To add a new appointment, do the following:

1. Click the **New Appointment** hyperlink

UMC of Bells Hollow

[Edit Church Info](#)

District: SOUTHERN
Charge: WEST SIDE
Type: Church Mission Church
GCNO: T00006 New Church Start
AlignNo: 36912 Do not report stats to Conference
Ethnicity: Asian Do not report stats to GCFA
EIDN: Tables Locked
Status: Active

2013 Stats There are no statistics saved for this church.

This church does not have a valid GCNO and it does not have stats for this year.
You can delete this church.

Address: 100 Main Street
Franklin, DC 20002

No Current Appointments

2. When the **Add New Appointment** window opens, enter the name of the desired appointee and click **Search**. Select the name from the **Pastor** drop down box.

Add New Appointment

Smith Amelia

Last Name First Name

Pastor: Search Results

Position: Search Results Amelia Smith

3. Select the position the person is being appointed to from the **Position** drop down box, then click the **Add** button.

4. The new appointment will appear on the page.

Name	Position		
Rev Nancy S Manner	05-Pastor	Edit	Delete
Amelia Smith	-Co-Pastor	Edit	Delete

New Appointment

5. If the person is not found via search (this would usually be because the person is new or has been added since the database was updated), simply click “New Person” and add the new pastor.

NOTE ABOUT PASTOR NUMBERS: The varying numbers associated with the pastors are there in order to assign seniority among pastors, with the lower number indicating higher seniority. By default, pastors are added as 05-Pastor in order to leave room for other pastors with more or less seniority.

CREATING SATELLITES

The Statistics module now supports satellite church functionality. Churches can record the satellite data separately and have it summed/rolled up to the parent church when reported to GCFA. This will allow the conference, district, and church to record and track growth from satellites while easily including the numbers when reporting to GCFA. This can be extremely useful for conferences that have chosen not to receive GCFA IDs for their satellites, but want to begin tracking them in Ezra separately from their parent.

1. Satellite churches with GCFA IDs should already be indicated as such in the Church Information Page. Please contact GCFA if there is any incorrect information here.
2. To designate a church as a satellite, go to Church Info, and search for the church. Click the **Edit Information** hyperlink.

Revival Revolution		
District:	NORTH EAST	Edit Church Info
Charge:	Asbury - Orange Park	
Type:	Church	<input type="checkbox"/> Mission Church
GCNO:	T00014 Edit GCNO	<input type="checkbox"/> New Church Start
AlignNo:		<input checked="" type="checkbox"/> Satellite Church
Ethnicity:	White	<input type="checkbox"/> Do not report stats to Conference
EIDN:		<input type="checkbox"/> Do not report stats to GCFA
		<input type="checkbox"/> Tables Locked

3. When the Add New Church window opens, select the **Satellite Church** checkbox.

Add New Church

Name:

District:

Charge:

Type: Mission Church

GCNO: T00014 New Church Start

AlignNo: **Satellite Church**

Ethnicity: Do not report to Conference

EIDN: Do not report to GCFA

Tables Locked

Status:

Address: Line 1

Line 2

City:

State:

Zip:

Parent Church:

- Select the Parent Church from the dropdown box, then click the **Add** button.

Add New Church

Name:

District:

Charge:

Type: Mission Church

GCNO: T00014 New Church Start

AlignNo:

Ethnicity: Satellite Church

EIDN: Do not report to Conference

Do not report to GCFA

Tables Locked

Status:

Address: Line 1

Line 2

City

State

Zip

Parent Church:

- The church information will be display the name of the parent church.

Revival Revolution	
District:	NORTH EAST Edit Church Info
Charge:	Asbury - Orange Park
Type:	Church <input type="checkbox"/> Mission Church
GCNO:	T00014 Edit GCNO <input type="checkbox"/> New Church Start
AlignNo:	<input checked="" type="checkbox"/> Satellite Church Parent Church: Druid Hills - Ocala
Ethnicity:	White <input type="checkbox"/> Do not report stats to Conference
EIDN:	<input type="checkbox"/> Do not report stats to GCFA
	<input type="checkbox"/> Tables Locked
Status:	Active
2017 Stats	There are no statistics saved for this church.
	This church does not have a valid GCNO and it does not have stats for this year. You can delete this church. <input type="button" value="Delete"/>
Address:	784 Riordan Drive Orange Park, FL 27439 <input type="button" value="No Current Appointments"/> New Appointment
Children:	No Current Children

The parent church will display the name of the child church on its church information page.

Druid Hills - Ocala										
District:	NORTH CENTRAL	Edit Church Info								
Charge:	Druid Hills - Ocala									
Type:	Church	<input type="checkbox"/> Mission Church								
GCNO:	350816 Edit GCNO	<input type="checkbox"/> New Church Start								
AlignNo:		<input type="checkbox"/> Satellite Church								
Ethnicity:	White	<input type="checkbox"/> Do not report stats to Conference								
EIDN:	59-1104459	<input type="checkbox"/> Do not report stats to GCFA								
		<input type="checkbox"/> Tables Locked								
Status:	Active									
2017 Stats	There are no statistics saved for this church.									
Address:	1712 SE Lake Weir Ave Ocala, FL 34471-5429	<table border="1"> <thead> <tr> <th>Name</th> <th>Position</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Rev Raphael Lucius Dessieu</td> <td>01-Pastor</td> <td>Edit</td> <td>Delete</td> </tr> </tbody> </table>	Name	Position			Rev Raphael Lucius Dessieu	01-Pastor	Edit	Delete
		Name	Position							
Rev Raphael Lucius Dessieu	01-Pastor	Edit	Delete							
New Appointment										
Children:	<table border="1"> <thead> <tr> <th>Name</th> </tr> </thead> <tbody> <tr> <td>Revival Revolution</td> </tr> </tbody> </table>	Name	Revival Revolution							
		Name								
Revival Revolution										

STATS HOME

CONFERENCE DASHBOARD

The dashboard on the module's main page allows the conference to tell at a glance the progress of statistics reporting from the churches. District pie charts are also shown.

Welcome: Demo User

Overview of Statistical Reports for Demo Annual Conference

Not Started:	<div style="width: 80%; background-color: #800000; height: 15px;"></div>	80%
Started:	<div style="width: 20%; background-color: #FFA500; height: 15px;"></div>	20%
Completed:	<div style="width: 7%; background-color: #008000; height: 15px;"></div>	7%

Message From The Conference Office: [Edit](#)

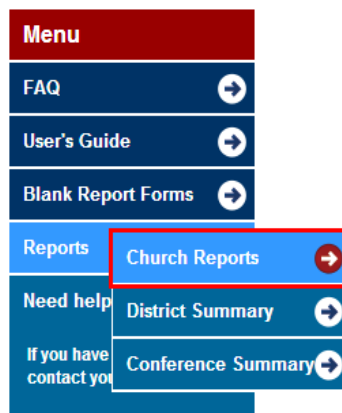
Please enter your statistics for this year. [If you have any questions, please contact the conference contact on the right of the screen.](#)

REPORTS

REPORTS SIDE PANEL MENU

RUNNING CHURCH REPORTS

1. Click the **Reports** hyperlink to open the **Reports** page. This is the page where you can access and print individualized church reports. To run a church report, do the following: To access this report, go to **Reports > Church Reports**.



2. Select the church's district.

Limit Church List To:

45 SOUTHERN	▼
All Churches	
40 NORTHERN	
45 SOUTHERN	

3. Designate a sort order.

Sort Church List By:

Church Name	▼
Church Name	
Alignment Number	
GCFA Number	
Submit Date	

4. (Optional) Select checkbox if you want to **Print All** of the available churches. If no, choose the churches to print from the text box.

Print All

GCFA # - Align # - Church Name

736565 - 45301 - CROSSLAKE
736758 - 45302 - METROPOLITAN
730741 - 45101 - ST MARKS
T00003 - t1234 - Test Mission
732512 - 45202 - TRINITY
T00006 - 36912 - UMC of Bells Hollow
732501 - 45201 - WEST SIDE
985402 - 45102 - WOODLAWN

*Uncheck "Print All" to make individual selections.
To select/deselect multiple churches use Ctrl+Click.*

5. Select the checkboxes next to the tables that you want to print.

Select the tables you want to print.

- Table 1
- Table 2
- Table 3
- Test

6. Select the checkbox if you want to compare the tables to the ones from the previous year.

Compare to Previous Year

Show Enabled Lines Only

Submitted Churches Only *Only used when Print All is checked

Submitted Since: * Entered date will be included in results

7. Select the checkbox to determine which churches you want to print.

Compare to Previous Year

Show Enabled Lines Only

Submitted Churches Only *Only used when Print All is checked

Submitted Since: * Entered date will be included in results

8. Click the **Run Report** button.

[Download PDF](#)

[Download PDF \(Condensed\)](#)

[Excel Export](#)

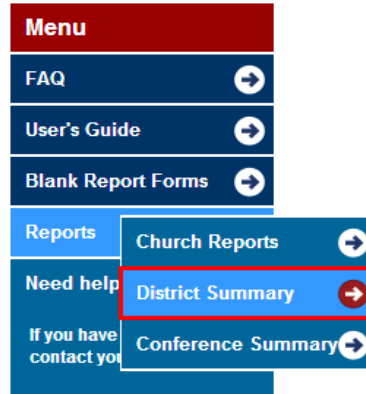
9. After the report is generated, you have the option to do the following:

- Download PDF
- Download PDF (Condensed)
- Excel Export

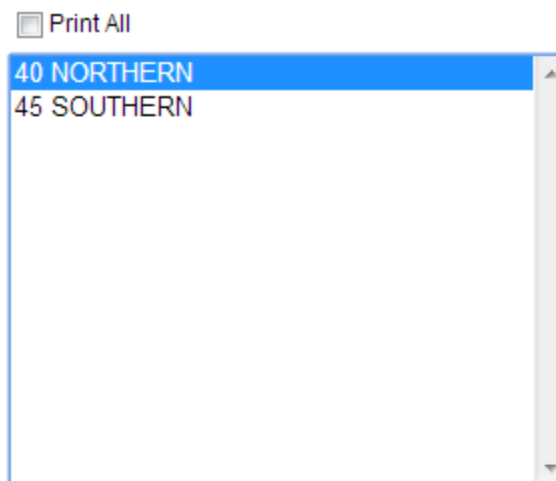
RUNNING DISTRICT SUMMARIES

To run a summary of districts that, do the following:

1. To access this report, go to **Reports > District Summary**.



2. Select a specific district or the **Print All** checkbox.



*Uncheck "Print All" to make individual selections.
To select/deselect multiple districts use Ctrl+Click.*

3. (Optional) Select the **Compare to Previous Year** checkbox.

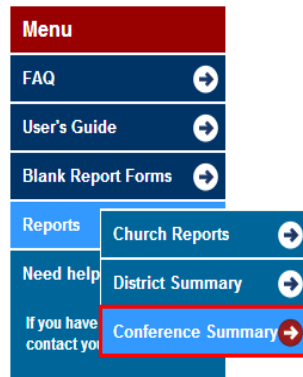
Compare to Previous Year

4. Click the **Run Report** button.



RUNNING CONFERENCE SUMMARY

1. To access this report, go to **Reports > Conference Summary**



2. Select the **Show Comparison to Previous year** checkbox, then click the **Run Report** button.

Print Conference Summary Report

Show Comparison to Previous Year

Note: Click Run Report then click the Download PDF or Download Excel link that appears below the buttons to open the report.



3. After the report generates, click your preferred download link.

Print Conference Summary Report

Show Comparison to Previous Year

Note: Click Run Report then click the Download PDF or Download Excel link that appears below the buttons to open the report.



[Download PDF](#)

[Download Excel](#)

UPLOADING NEW DOCUMENTS

To upload documents to the **Reports** page, do the following:

1. Click the **Submit New Document** hyperlink.

<i>Demo Conference Worksheets</i>		
Submit New Document		
TN Intermediate Report Worksheet	This is the worksheet for churches who were unable to complete theirs due to emergency situations.	Edit Delete

2. When the **Submit a New Document** window opens, browse to the desired document. Name and describe the document, then click the **Submit** button.

Submit A New Document

Expanding th...inavia.docx

Name:

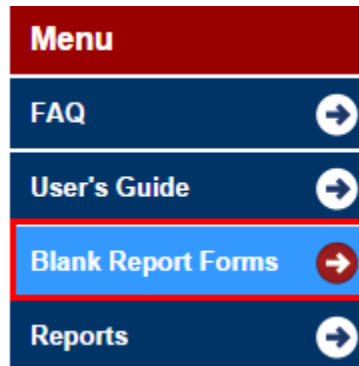
Description:

3. The new document will appear in the table.

<i>Demo Conference Worksheets</i>		
Submit New Document		
Application for Exemption or Extension	This is the worksheet for churches requesting and exemption or extension.	Edit Delete
TN Intermediate Report Worksheet	This is the worksheet for churches who were unable to complete theirs due to emergency situations.	Edit Delete

BLANK REPORT FORMS

1. To download blank report forms from Ezra, select the **Blank Report Forms** link.



2. When the **Print Individual Church Input Forms** page opens, select the church that you want the form printed. If you simply want a blank form, select the checkbox on the page.

Print Individual Church Input Forms

45 SOUTHERN ▼

Sort Church List By:

Church Name ▼

Print All

Print blank report with no church information only

Note: Click Run Report then click the Download PDF link that appears next to the Run Report button to open the report.

GCFA # - Align # - Church Name
736565 - 45301 - CROSSLAKE
736758 - 45302 - METROPOLITAN
730741 - 45101 - ST MARKS
T00003 - t1234 - Test Mission
732512 - 45202 - TRINITY
T00006 - - UMC of Merlotte
732501 - 45201 - WEST SIDE
985402 - 45102 - WOODLAWN

Run Report Exit

Uncheck "Print All" to make individual selections.
To select/deselect multiple churches use Ctrl+Click.

- Click the **Run Report** button.

Print Individual Church Input Forms

45 SOUTHERN ▼

Sort Church List By:

Church Name ▼

Print All

GCFA # - Align # - Church Name

- 736565 - 45301 - CROSSLAKE
- 736758 - 45302 - METROPOLITAN
- 730741 - 45101 - ST MARKS
- T00003 - t1234 - Test Mission
- 732512 - 45202 - TRINITY
- T00006 - - UMC of Merlotte
- 732501 - 45201 - WEST SIDE
- 985402 - 45102 - WOODLAWN

Uncheck "Print All" to make individual selections.
To select/deselect multiple churches use Ctrl+Click.

Print blank report with no church information only

Note: Click Run Report then click the Download PDF link that appears next to the Run Report button to open the report.

Run Report
Exit

- When finished, click **Exit** to return to the **Reports Homepage**.

CHARTS

After selecting a **Conference**, the dropdown box will display the selected conference and the number of churches in the database that belong to that conference. To further narrow the results, enter the name of the church in the **Church Name** search box or any other information in the related search boxes, then click the **Search** button.

Graphs

Church Graphs

Membership/Attendance	Membership Growth
Avg. Sunday School Attendance	Received By Profession of Faith
Apportionment Percent Paid	Church Summary Report

STATISTICAL REPORTS AND FORMS

This table contains all of the reports available from the module. Click on the desired hyperlink to customize or generate the report.

Conference Reports	
Statistics Reports and Forms	Instructions and Guides
Individual Church Stats Report Blank Church Input Form District Summary Stats Report Conference Summary Stats Report Conference Stats Spreadsheet GCFA Stats Spreadsheet (GCFA Lines) GCFA Conference Summary (GCFA Lines) Stats History Custom Export	Quick Tutorials (Videos) What's New in 2017? Conference Users Guide Church Users Guide Church User Guide (Word doc) Notes on Church Membership Notes on Church Types New Custom Export Instructions GCFA Default Warnings/Validations GCFA Default Line Directions Guide to Setting Up a New Year Setting Up New Year Checklist
Helpful Lists	Reports for the Submission Process
Church Listing with Pastors Pastor Listing with Churches System Users "Do Not Report" Churches GCFA Stats Report Line Codes with Descriptions Table Directions - All Lines	Submit Status Report Closed/Merged Churches Warning Report Error/Integrity Report Submit Comments Validations Fund Listing with Assignment Codes Stats Verified Report

INDIVIDUAL CHURCH STATS REPORT

This report allows the conference user to print church reports individually or all together based on the selected tables and years chosen. Download the file after generating the report.

Print Individual Church Reports

Limit Church List To:

All Churches

Sort Church List By:

Church Name

Print All

GCFA # - Align # - Church Name

649514 - 12111 - 614 Church
649605 - 02020 - ADAMSVILLE
655982 - 05015 - ADARIO
657640 - 09021 - ADENA
652102 - 03020 - ALDERSGATE
653026 - 04020 - ALDERSGATE
648554 - 05270 - ALL GODS CHILDREN
659568 - 08180 - AMBOY
648417 - 07020 - AMHERST OLD STONE
656007 - 00000 - AMHERST PARK AVENU
649503 - 07010 - AMHERST
650876 - 09452 - AMITY
654225 - 06020 - AMITY
657684 - 10020 - AMSTERDAM
659581 - 08020 - ANDOVER

Uncheck "Print All" to make individual selections.

To select/deselect multiple churches use Ctrl+Click.

Select the tables you want to print.

Misc Data Sheet 1

Misc Data Sheet 2

Table 1

Table 2

Table 3

Compare to Previous Year

Show Enabled Lines Only

Include Conference Comments

Submitted Churches Only *Only used when Print All is checked

Submitted Since: * Entered date will be included in results

Note: Click Run Report then click the Download PDF link that appears next to the Run Report button to open the report.

Run Report

Exit

Special Instruction: If you are having trouble opening the report, please right click on 'Download PDF' or 'Save link as...' and select 'Save target as' to save the report. You will then be able to open and print it from there.

BLANK CHURCH INPUT FORM

This allows the church or conference user to print forms that include the previous year's statistical information but has a blank space for the current year's statistical information. Some information in the header is automatically populated based on what is available in the database.

Print Individual Church Input Forms

All Churches ▼

Sort Church List By:

Church Name ▼

Print All

GCFA # - Align # - Church Name

649514 - 12111 - 614 Church
649605 - 02020 - ADAMSVILLE
655982 - 05015 - ADARIO
657640 - 09021 - ADENA
653026 - 04020 - ALDERSGATE
652102 - 03020 - ALDERSGATE
648554 - 05270 - ALL GODS CHILDREN
659568 - 08180 - AMBOY
649503 - 07010 - AMHERST
648417 - 07020 - AMHERST OLD STONE
656007 - 00000 - AMHERST PARK AVENU
650876 - 09452 - AMITY
654225 - 06020 - AMITY
657684 - 10020 - AMSTERDAM
659581 - 08020 - ANDOVER

Uncheck "Print All" to make individual selections.

To select/deselect multiple churches use Ctrl+Click.

Print blank report with no church information only

Note: Click Run Report then click the Download PDF link that appears next to the Run Report button to open the report.

Run Report

Exit

Special Instruction: If you are having trouble opening the report, please right click on 'Download PDF' and select 'Save target as' or 'Save link as...' to save the report. You will then be able to open and print it from there.

DISTRICT SUMMARY STATS REPORT

The District Summary Stats Report allows the conference user to generate reports for either all or some of districts.

Print Individual Church Input Forms

All Churches ▼

Sort Church List By:

Church Name ▼

Print blank report with no church information only

Print All

GCFA # - Align # - Church Name

649514 - 12111 - 614 Church
649605 - 02020 - ADAMSVILLE
655982 - 05015 - ADARIO
657640 - 09021 - ADENA
653026 - 04020 - ALDERSGATE
652102 - 03020 - ALDERSGATE
648554 - 05270 - ALL GODS CHILDREN
659568 - 08180 - AMBOY
649503 - 07010 - AMHERST
648417 - 07020 - AMHERST OLD STONE
656007 - 00000 - AMHERST PARK AVENU
650876 - 09452 - AMITY
654225 - 06020 - AMITY
657684 - 10020 - AMSTERDAM
659581 - 08020 - ANDOVER

Run Report

Exit

Note: Click Run Report then click the Download PDF link that appears next to the Run Report button to open the report.

Special Instruction: If you are having trouble opening the report, please right click on 'Download PDF' and select 'Save target as' or 'Save link as...' to save the report. You will then be able to open and print it from there.

Uncheck "Print All" to make individual selections.

To select/deselect multiple churches use Ctrl+Click.

CONFERENCE SUMMARY STATS REPORT

The Conference Summary Stats Report gives a summary of all the conference's churches' statistics (with the exception of any churches with "Do Not Report to Conference" selected in Church Info). A previous year can be included and the user can determine whether to include or exclude New Church Starts and Mission Churches.

Print Conference Summary Report

Show Comparison to Previous Year

Include: New Church Starts

Mission Churches

Note: Click Run Report then click the Download PDF or Download Excel link that appears below the buttons to open the report.

Run Report

Exit

CONFERENCE STATS SPREADSHEET

This report gives the church-level data of all churches reporting to the conference as described above for the summary.

1. Select the settings and lines to report, then click the **Run Report** button.

Retrieve Statistical Information

Church Information To Show

- Church Name
 Align Number
 Conference
 District
 Church Type
 Pastor
 Ethnicity
 Employer ID No.
 Charge Info
 Address
 City
 State
 Zip Code
 County

Districts

- Print All
 32 CN
 42 FL
 44 MV

 ^ Uncheck "Print All" to make individual selections
 ▾ To make multiple selections/deselect from the list, use Ctrl+Click

Sort Order

Church Number ▾

Tables To Show

- Misc Data Sheet 1
 Misc Data Sheet 2
 Table 1
 Table 2
 Table 3
 Enabled Lines Only

<input checked="" type="checkbox"/>	Line#	Code	Status	Enabled	Description
<input checked="" type="checkbox"/>	1.1	P1SALSET	A	Y	Salary Set
<input checked="" type="checkbox"/>	1.2	SALPD	A	Y	Salary Paid by Church
<input checked="" type="checkbox"/>	1.3	PAS1UTILPD	A	Y	Utilities Paid
<input checked="" type="checkbox"/>	1.4	P1HOCASH	A	Y	Housing and Other Cash Allowances
<input checked="" type="checkbox"/>	1.5	P1RVTRAVL	A	Y	Reimbursed/Vouchered Travel & Pastor Cont. Ed.
<input checked="" type="checkbox"/>	1.6	P1FRTRAVL	A	Y	Flat Rate Travel

2. Click the desired hyperlink to download the processed file.

Retrieve Statistical Information

Church Information To Show

- Church Name
 Align Number
 Conference
 District
 Church Type
 Pastor
 Ethnicity
 Employer ID No.
 Charge Info
 Address
 City
 State
 Zip Code
 County

Districts

- Print All
 32 CN
 42 FL
 44 MV

 ^ Uncheck "Print All" to make individual selections
 ▾ To make multiple selections/deselect from the list, use Ctrl+Click

Sort Order

Church Number ▾

Tables To Show

- Misc Data Sheet 1
 Misc Data Sheet 2
 Table 1
 Table 2
 Table 3
 Enabled Lines Only

<input checked="" type="checkbox"/>	Line#	Code	Status	Enabled	Description
<input checked="" type="checkbox"/>	1.1	P1SALSET	A	Y	Salary Set
<input checked="" type="checkbox"/>	1.2	SALPD	A	Y	Salary Paid by Church
<input checked="" type="checkbox"/>	1.3	PAS1UTILPD	A	Y	Utilities Paid
<input checked="" type="checkbox"/>	1.4	P1HOCASH	A	Y	Housing and Other Cash Allowances
<input checked="" type="checkbox"/>	1.5	P1RVTRAVL	A	Y	Reimbursed/Vouchered Travel & Pastor Cont. Ed.
<input checked="" type="checkbox"/>	1.6	P1FRTRAVL	A	Y	Flat Rate Travel

GCFA CONFERENCE SUMMARY (GCFA LINES)

The GCFA Conference Summary gives a summary of only the churches submitted to GCFA and only the values for the official GCFA lines (no custom lines). This would not include any churches without a valid GCFA ID and any churches with “Do Not Report to GCFA” selected.

Conference Summary of Data Reporting to GCFA

Show Comparison to Previous Year

Note: Click Run Report then click the Download PDF or Download Excel link that appears below the buttons to open the report.

Run Report

Exit

GCFA STATS SPREADSHEET (GCFA LINES)

The GCFA Stats Spreadsheet pulls the data submitted on the GCFA designated lines for all of the churches as indicated above.

Retrieve Statistical Information - GCFA's Version

Church Information To Show

Church Name
 Align Number
 Conference
 District
 Church Type
 Pastor
 Ethnicity
 Employer ID No.
 Charge Info
 Address
 City
 State
 Zip Code
 County

Districts

Print All
 32 CN
 42 FL
 44 MV

Uncheck "Print All" to make individual selections
To make multiple selections/deselect from the list, use Ctrl+Click

Sort Order

Church Number

Tables To Show

Table I
 Table II
 Table III
 Enabled Lines Only

 Processing....

Run Report

Reset

Exit

<input checked="" type="checkbox"/>	Line#	Code	Status	Enabled	Description
<input checked="" type="checkbox"/>	1	MEMBPREV	A	Y	Total professing members reported at the close of last year
<input checked="" type="checkbox"/>	2.a	RECPROF	A	Y	Received this year on Profession of Christian Faith
<input checked="" type="checkbox"/>	2.b	RECREST	A	Y	Restored by affirmation
<input checked="" type="checkbox"/>	2.c	RECCOR	A	Y	Correct previous year's reporting errors of total professing membership numbers by addition
<input checked="" type="checkbox"/>	3	RECUMC	A	Y	Transferred in from other United Methodist churches
<input checked="" type="checkbox"/>	4	RECOTH	A	Y	Transferred in from non-United Methodist churches
<input checked="" type="checkbox"/>	5.a	REMCHR	A	Y	Removed by Charge Conference action
<input checked="" type="checkbox"/>	5.b	REMWITH	A	Y	Withdrawn from Professing Membership

STATS HISTORY

This report is designed to give historical statistics (as far back as 1974) for a church, district, or annual conference. The level of access to reports is dependent on your user account (whether you are a church, district, or conference user). For district and conference reports, you can choose to download summaries or details (individual churches within).

STATS HISTORY

Annual Conference

District

Churches

Choose Level Conference District Church

Years: From: To:

[Build Details](#) [Build Summary](#)

CUSTOM EXPORT

The Custom Export allows the user to create custom exports for the collected data.

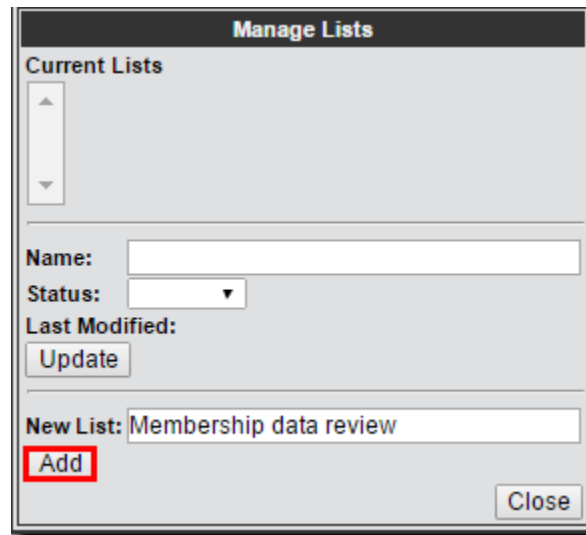
1. After the Custom Export page opens, select the **Manage Lists** hyperlink.

Extract Church Data

SELECT THE STATISTICAL VALUES TO USE

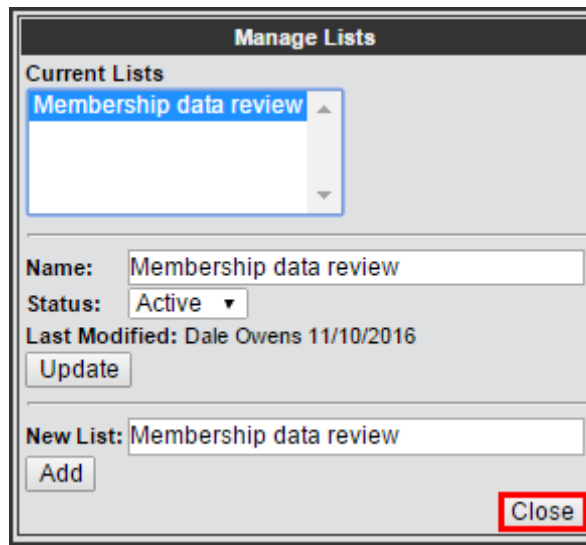
AVAILABLE STATS			SELECTED STATS		
<input type="text" value="All Tables"/>			<input type="text" value="Select List"/> Manage Lists		
Line #	Code	Description	Line #	Code	Description
1	MEMBPREV	Total professing members repor...			
2.a	RECPROF	Received this year on Professi...			
2.b	RECREST	Restored by affirmation			
2.c	RECCOR	Correct previous year's report...			
3	RECUMC	Transferred in from other Unit...			
4	RECOTH	Transferred in from non-United...			
5.a	REMCHR	Removed by Charge Conference a...			
5.b	REMWITH	Withdrawn from Professing Memb...			
5.c	REMCOR	Correct previous year's report...			
6	REMUMC	Transferred out to other Unite...			
7	REMOTH	Transferred out to non-United ...			
8	REMDEATH	Removed by death			
9	MEMBTOT	Total professing members repor...			
9.a	MEMBA	Asian			

- When the Manage Lists window opens, enter the name of a new list to create, then click the **Add** button.



The screenshot shows the 'Manage Lists' window. At the top, there is a 'Current Lists' section with an empty list box. Below this, there are fields for 'Name:', 'Status:', and 'Last Modified:', followed by an 'Update' button. At the bottom, there is a 'New List:' field containing the text 'Membership data review' and an 'Add' button, which is highlighted with a red box. A 'Close' button is located in the bottom right corner.

- After the newly created list is added to the Current Lists window, select the list from the Current Lists window, then click the **Close** button. Additional lists can be created at any time.



The screenshot shows the 'Manage Lists' window after a list has been added. The 'Current Lists' section now contains one item, 'Membership data review', which is highlighted in blue. Below this, the 'Name:' field is filled with 'Membership data review', the 'Status:' dropdown is set to 'Active', and the 'Last Modified:' field shows 'Dale Owens 11/10/2016'. There is an 'Update' button. At the bottom, the 'New List:' field still contains 'Membership data review' and has an 'Add' button. The 'Close' button in the bottom right corner is highlighted with a red box.

Note: All created lists are shared with and accessible by other individuals in the conference.

- Select the desired tables from the dropdown panel, then click the blue arrow on the desired rows to add them to the Selected Stats column.

SELECT THE STATISTICAL VALUES TO USE

AVAILABLE STATS

All Tables ▾

Line #	Code	Description	
2.a	RECPROF	Received this year on Professi...	➡
2.b	RECREST	Restored by affirmation	➡
2.c	RECCOR	Correct previous year's report...	➡
3	RECUMC	Transferred in from other Unit...	➡
4	RECOTH	Transferred in from non-United...	➡
5.a	REMCHR	Removed by Charge Conference a...	➡
5.b	REMWITH	Withdrawn from Professing Memb...	➡
5.c	REMCOR	Correct previous year's report...	➡
6	REMUMC	Transferred out to other Unite...	➡
7	REMOTH	Transferred out to non-United ...	➡
8	REMDEATH	Removed by death	➡
9.a	MEMBA	Asian	➡
9.b	MEMBAA/B	African American/Black	➡
9.c	MEMBH	Hispanic/Latino	➡

SELECTED STATS

Membership data review ▾ [Manage Lists](#)

Line #	Code	Description		
➡ 1	MEMBPREV	Total professing members repor...		⬇
➡ 9	MEMBTOT	Total professing members repor...	⬆	⬇

- To move a line that has been added to the Selected Stats column, click the up or down arrow on the row. The list is automatically saved as lines are added, removed, or sorted.

SELECTED STATS

Membership data review ▾ [Manage Lists](#)

Line #	Code	Description		
➡ 1	MEMBPREV	Total professing members repor...		⬇
➡ 9	MEMBTOT	Total professing members repor...	⬆	⬇
➡ 9.b	MEMBAA/B	African American/Black	⬆	⬆

- The row will be moved by one row in the direction selected. The order of the rows determines the order of the columns in the exported datasheet.

SELECTED STATS

Membership data review ▾ [Manage Lists](#)

Line #	Code	Description		
➡ 1	MEMBPREV	Total professing members repor...		⬇
➡ 9.b	MEMBAA/B	African American/Black	⬆	⬇
➡ 9	MEMBTOT	Total professing members repor...	⬆	

SETTING FILTERS

1. Select the number of years of data that you would like to retrieve. The maximum number of years available is listed.

ENTER THE NUMBER OF YEARS TO GET

Including 2015, how many years of data would you like? Max Years: 17

2. Select the types of churches that you would like to export by selecting the checkboxes.

SELECT THE TYPES OF CHURCHES YOU WOULD LIKE TO EXPORT

- Chartered
- New Church Start
- Satellite
- Mission

3. Select the desired church from the dropdown box.

SELECT THE CHURCHES YOU WOULD LIKE TO EXPORT

All Churches in the Conference

All Churches in a District

Individual Church(es)

- Select District ▾
- Select District
- CN
- FL
- MO**
- MV
- WR

SELECT THE FORMAT OF THE DATA

Option 1 Option 2 Option 3

4. Click the radial button next to the desired data format for the generated export. Click the Example link to see an example of the selected format.

SELECT THE FORMAT OF THE DATA

Option 1 Option 2 Option 3 [Example](#)

- To save the filters that were set as the default settings for all searches going forward, click the **Save Filters as Default** button. The default setting will apply to all searches that are run unless changed or modified.

ENTER THE NUMBER OF YEARS TO GET

Including 2015, how many years of data would you like? Max Years: 17

SELECT THE TYPES OF CHURCHES YOU WOULD LIKE TO EXPORT

Chartered
 New Church Start
 Satellite
 Mission

SELECT THE CHURCHES YOU WOULD LIKE TO EXPORT

All Churches in the Conference
 All Churches in a District
 Individual Church(es)

656348 - 07131 - COLLINS
656383 - 07140 - COLUMBIA
658006 - 12130 - COLUMBIANA
659295 - 07460 - COLUMBUS AVENUE
656430 - 07160 - COMMUNITY
649092 - 08170 - CONCORD HOPE RIDGE
654544 - 06131 - CONESVILLE
651701 - 11140 - CONGRESS FED
648997 - 08405 - CONNEAUT NEW LEAF
648667 - 01310 - COPLEY
656717 - 07114 - COPNEBOSTONE

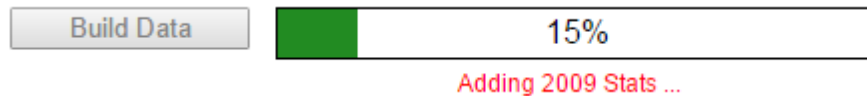
SELECT THE FORMAT OF THE DATA

Option 1 Option 2 Option 3 [Example](#)

Save Filters as Default Last saved by Dale Owens on 11/10/2016

BUILDING AND EXPORTING DATA

- Click the **Build Data** button.



- After the data is built, click the **Export Data Option** hyperlink to download a CSV file.



- Open the CSV file to review the exported data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	GCNO	AlignNo	Church	ChurchTyp	DistNo	District	ConfNo	Conferenc	Year	1_(2011)	1_(2012)	1_(2013)	1_(2014)	1_(2015)	9_(2011)	9_(2012)	9_(2013)	9_(2014)	9_(2015)
2	648543	01375	JOHNSON	Chartered	32	CN	180	EAST OH	2015	424	380	354	348	331	380	354	348	331	337
3	650320	09270	JERUSAL	Chartered	68	SH	180	EAST OH	2015	87	84	82	80	82	84	82	80	82	82
4	655047	11240	JEROMES	Chartered	56	MO	180	EAST OH	2015	213	230	231	241	249	230	231	241	249	249
5	658520	10291	JEWETT	Chartered	62	OV	180	EAST OH	2015	124	128	120	127	125	128	120	127	125	126
6	660306	08300	JOHNSTC	Chartered	98	WR	180	EAST OH	2015	143	138	133	130	124	138	133	130	124	120

HELPFUL LISTS

CHURCH LISTINGS WITH PASTORS

This report pulls a list of the active or closed/merged churches as controlled by the selected checkboxes.

List of churches with their assigned pastors.

Print All

32 CN
42 FL
44 MV
56 MO
58 NC
62 OV
68 SH
72 TR
84 TW
88 WR

Active Churches Only

Closed/Merged Churches Only

Run Report

Exit

Uncheck "Print All" to make individual selections.

To select/deselect multiple churches use Ctrl+Click.

PASTOR LISTING WITH CHURCHES

This report pulls a list of the churches with the assigned pastors.

List of churches with their assigned pastors.

Print All

32 CN
42 FL
44 MV
56 MO
58 NC
62 OV
68 SH
72 TR
84 TW
88 WR

Active Churches Only

Closed/Merged Churches Only

Run Report

Exit

Uncheck "Print All" to make individual selections.

To select/deselect multiple churches use Ctrl+Click.

SYSTEM USERS

This report pulls a list of all the users in the system. This report will be updated as new users log in for the first time and input their contact information.

Systems Users Report

This will give you a report with a list of all your users.

[Download Excel](#)

Exit

“DO NOT REPORT” CHURCHES

This report pulls a list of all the churches marked as “Do Not Report”.

CHURCHES MARKED AS DO NOT REPORT STATISTICS

10/25/201

<u>GCNO</u>	<u>Church</u>	<u>Status</u>	<u>District</u>	<u>GCFA</u>	<u>Conference</u>
858638	JUSTA CENTER UM FELLOWSHIP	A	CENTRAL EAST	X	X
004975	Hispanic Ministry Start	A	NORTH	X	

LINE CODES WITH DESCRIPTIONS

This generates a PDF file with the line code and a description of the code.

2016 Lines for the Desert Southwest Conference
Table 1

	<u>Code</u>	<u>Description</u>	<u>Status</u>	<u>Enabled</u>	<u>Sort Order</u>	<u>% Warnings</u>	<u>Linked</u>
1	MEMBPREV	Total professing members reported at the close of last year	A	Y	001.0		
2.a	RECPROF	Received this year on Profession of Christian Faith	A	Y	002.1		
2.b	RECREST	Restored by affirmation	A	Y	002.2		
2.c	RECCOR	Correct previous year's reporting errors of total professing membership numbers by addition	A	Y	002.3		
3	RECUMC	Transferred in from other United Methodist churches	A	Y	003.0		

TABLE DIRECTIONS – ALL LINES

This generates a PDF of all of the table directions for all of the lines.

9 Enter here the figure reported from calculating $1+(2.a+2.b+2.c+3+4)-(5.a+5.b+5.c+6+7+8)=9$. Affiliate, associate, and baptized members (who have not yet become professing members) should not be counted as professing members.

9.a-9.g On the following lines report for each member the racial/ethnic group with which she or he identifies, or to which she or he is regarded in the community as belonging. Each member should be included in only one group. The total number of membership in 9.a to 9.g must equal the total entered in line 9.

9.a Members with origins and/or heritage in any of the indigenous peoples of Asia, Southeast Asia, or the Indian Subcontinent. This area includes but is not limited to Bangladesh, Cambodia, China, India, Indonesia, Japan, Korea, Laos, Malaysia, Myanmar, Pakistan, Philippines, Singapore, Sri Lanka, Taiwan, Thailand, and Vietnam.

9.b Members with origins and/or heritage in the Black African racial groups of Africa, the Caribbean, or North, Central, or South America who identify themselves as "African American" or "Black."

9.c Members of Central American, Cuban, Mexican, Puerto Rican, South American, or Spanish culture or heritage, regardless of race

REPORTS FOR THE SUBMISSION PROCESS

SUBMIT STATUS REPORT

This report pulls the submittal status for all of the churches in the selected districts.

Submit Status Report

Select the district(s) you would like to print.

All Districts

32 CN
42 FL
44 MV
56 MO
58 NC

Select the status you would like to print.

(Church has submitted their Information)

Submitted

(Church has entered some data, but has not submitted their Tables)

Not Submitted with activity

(Church has not entered any information into their Tables)

Not Submitted with no activity

Old Report

Run Report

Exit

CLOSED/MERGED CHURCHES

This report pulls all of the churches marked closed or merged for all of the selected districts.

Warning Report

Print All

Districts:

- 32 CN
- 42 FL
- 44 MV
- 56 MO
- 58 NC
- 62 OV
- 68 SH
- 72 TR
- 84 TW
- 88 WR

This report will show you all the warnings for your conference. If you would like to see the warnings for a specific district(s), uncheck Print All and select the district(s) you would like to view.

- Show All Warnings
- Show Explained Warnings Only
- Show Unexplained Warnings Only

**** This report may take up to 1 minute to run.**

*Uncheck "Print All" to make individual selections
Use Ctrl + Click to select and deselect items from the list.*

ERROR/INTEGRITY REPORT

This report pulls all of flagged errors for the selected districts and the selected lines.

Conference Error/Integrity Report

Districts

Validations

Print All

- 32 CN
- 42 FL
- 44 MV
- 56 MO
- 58 NC
- 62 OV
- 68 SH
- 72 TR
- 84 TW
- 88 WR

Uncheck "Print All" to make individual selections.

To select/deselect multiple districts use Ctrl+Click.

Select	Line #	Description
<input checked="" type="checkbox"/>	PT.1	Salary Set
<input checked="" type="checkbox"/>	PT.2	Salary Paid by Church
<input checked="" type="checkbox"/>	PT.3	Utilities Paid
<input checked="" type="checkbox"/>	PT.4	Housing and Other Cash Allowances
<input checked="" type="checkbox"/>	PT.5	Reimbursed/Vouchered Travel & Pastor Cont. Ed.
<input checked="" type="checkbox"/>	PT.6	Flat Rate Travel
<input checked="" type="checkbox"/>	AT.2	Salary Paid by Church
<input checked="" type="checkbox"/>	AT.3	Utilities Paid
<input checked="" type="checkbox"/>	AT.4	Housing and Other Cash Allowances
<input checked="" type="checkbox"/>	AT.5	Reimbursed/Vouchered Travel & Pastor Cont. Ed.
<input checked="" type="checkbox"/>	AT.6	Flat Rate Travel
<input checked="" type="checkbox"/>	64	Total income from connectional and other institutional sources outside the local church

*Note: This report will take 1 to 3 minutes to run on average.
The more districts/validations you run the longer it will take.*



SUBMIT COMMENTS

This report pulls all of the submitted comments for each line.

Statistical Report Comments

CENTRAL EAST

SHOW LOW WHITE MOUNTAIN (891713)

Jessica Boucher

Thank you for making this as easy as possible!

WESLEY (881747)

Bobby McCray BMcCray316@aol.com

I am submitting this report on behalf of Wesley UMC and Pastor Dave Patterson. The church email is

VALIDATIONS

This report pulls the validations added to the tables.

Validations In Place for Statistical Tables

Line	Table	Formula	ErrMsg
PT.1	Misc Data Sheet 1	1.1 + 2.1 = PT.1	This line = 1.1 + 2.1 Salary Set
PT.2	Misc Data Sheet 1	1.2 + 2.2 = PT.2	PT.2 1.2 + 2.2 = Salary Paid by Church
PT.3	Misc Data Sheet 1	1.3 + 2.3 = PT.3	1.3 + 2.3 = All Pastors Utilities pd
PT.4	Misc Data Sheet 1	1.4 + 2.4 = PT.4	1.4 + 2.4 = Housing & other Cash Allowance for pastors
PT.5	Misc Data Sheet 1	1.5 + 2.5 = PT.5	1.5 + 2.5 = Reimbursed/Vouchered Travel
PT.6	Misc Data Sheet 1	1.6 + 2.6 = PT.6	1.6 + 2.6 = Pastors totals for Flat Rate Travel
AT.2	Misc Data Sheet 1	3.2 + 4.2 + 5.2 = AT.2	3.2 + 4.2 + 5.2 = all Salary Paid by Church
AT.3	Misc Data Sheet 1	3.3 + 4.3 + 5.3 = AT.3	3.3+4.3+5.3 Utilities Paid
AT.4	Misc Data Sheet 1	3.4 + 4.4 + 5.4 = AT.4	3.4+4.4+5.4 Housing and Other Cash Allowances

FUND LISTING WITH ASSIGNMENT CODES

This is a list of the funds with appropriate codes that were assigned to them.

Fund No	FundName	GCFA Appor Code	Gcfa Paid Code	Percent
35b	35b-Local Church	TOTAPP	APPPAID	100
36b	36b-District	DISTAPPOR	DISTPAID	100
37	37-Gen Adv	0	GENADV	100
38	38-World Serv Specials	0	WSSPEC	100
39	39-AC Adv Spec	0	CONFADV	100
40	40-Youth Service Fund	0	YSF	100

STATS VERIFIED REPORT

This report pulls a list of all of the churches and districts that have their submitted statistics verified.

Stats Verified Report

This report is designed to let you see which of your churches have had their stats marked and verified and which have not. Just check the options below to pull the report with the information you would like to see.

- Include Verified Churches
- Include churches that were verified but then unmarked.
- Include churches that were never marked as verified.

[Download Excel Report](#)

[Download CSV Report](#)

Exit

UPLOADING A NEW DOCUMENT

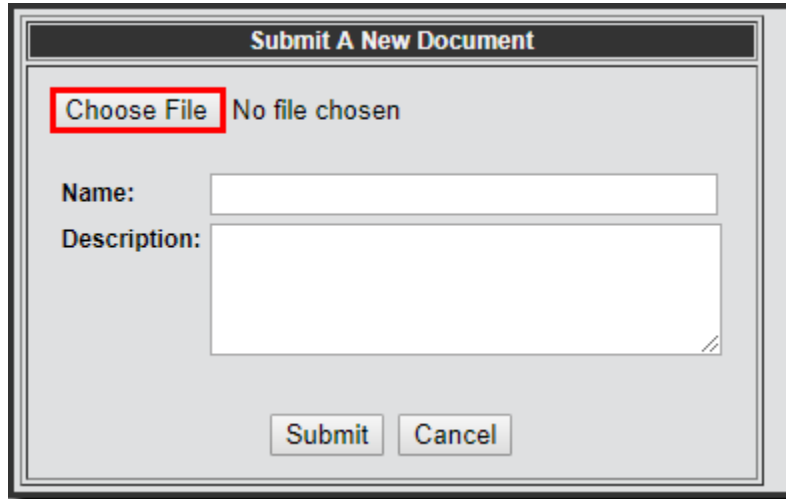
1. Click the **Submit New Document** hyperlink.

EAST OHIO Conference Worksheets

[Submit New Document](#)

No documents have been uploaded.

- When the Submit a New Document window opens, click the **Choose File** button to browse to the desired file.



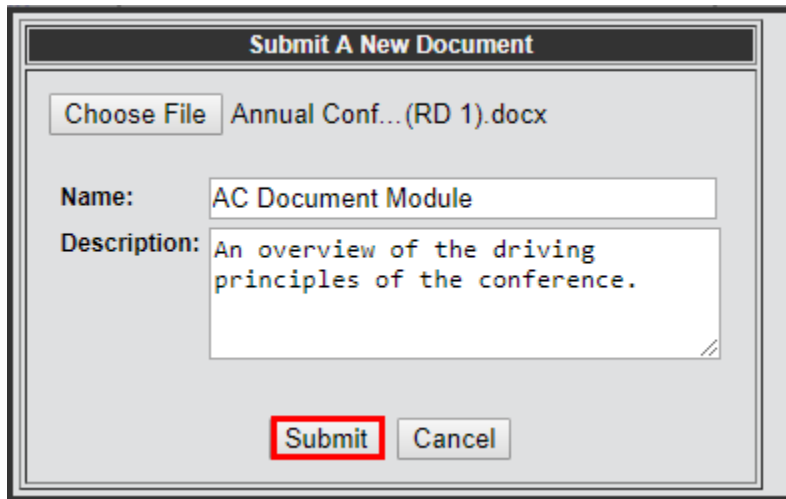
Submit A New Document

Choose File No file chosen

Name:

Description:

- After adding the file, enter a name and description for the file before clicking the **Submit** button.



Submit A New Document

Annual Conf... (RD 1).docx

Name:

Description:

- The new file will be uploaded to the worksheets window.

EAST OHIO Conference Worksheets		
Submit New Document		
AC Document Module	An overview of the driving principles of the conference.	Edit Delete

ADMIN TOOLS

GRAND TOTAL

Grand Total is the final action most conferences take before building their table and submitting their statistics to GCFA. To access this function, go to **Admin Tools > Grand Total**.

1. Select the boxes that you want to include in your Grand Total Calculation. Click the **Update** button. (This is where you want to be sure that no lines are being double-counted in the case of subtotals and such.)

Setup Grand Total Function

Directions: Check the box next to the lines that you want to include in the Grand Total Calculation.

Last Modified By: Demo User

Date: Oct 03, 2014

<input checked="" type="checkbox"/>	Line #	Code	Description
<input checked="" type="checkbox"/>	31	VALPROP	Market value of church-owned land, buildings and equipment
<input checked="" type="checkbox"/>	32	VALOTH	Market value of all other church-owned assets
<input checked="" type="checkbox"/>	33	DEBTCHUR	Debt secured by church physical assets
<input checked="" type="checkbox"/>	34	DEBTOTH	Other debt
<input checked="" type="checkbox"/>	35.a	TOTAPP	Total amount APPORTIONED to the local church for all causes paid to the AC Treasurer
<input checked="" type="checkbox"/>	35.b	APPPAID	Total amount PAID by the local church for all apportioned causes to AC Treasurer
<input checked="" type="checkbox"/>	36.a	DISTAPPOR	Total amount APPORTIONED to the local church for all apportioned causes directly paid to the DISTRICT
<input checked="" type="checkbox"/>	36.b	DISTPAID	Total amount PAID by the local church for apportioned causes directly paid to the DISTRICT
<input checked="" type="checkbox"/>	37	GENADV	Total amount for General Advance Specials remitted to the Annual Conference Treasurer

2. Once you are ready to run the grand total, click the **Calculate** button. This will automatically sum up all lines as indicated and place the value in the Grand Total line on TABLE 2.

Grand Total Function and Calculation

Calculate The Grand Total

This is used to automatically set the value for the Grand Total line on Table 2. This will apply the calculated value to the line with the code GRANDTOT. If this code is NOT your grand total, please contact the administrator.

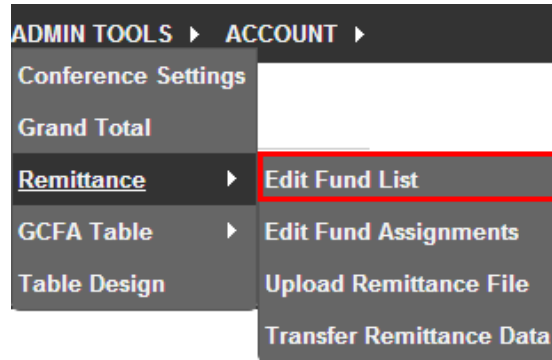
*** WARNING: If you click this button, the current values will be replaced. ***

This function has not been run for this year.

REMITTANCE UPLOADS

EDIT FUND LIST

1. To edit the Fund List, go to **Admin Tools > Remittance > Edit Fund List**.



2. When the **Funds List** page opens, click the **Edit** hyperlink.

Funds List

	Fund Number	Fund Name
Edit Delete	100	World Service
Edit Delete	101	New Fund
Edit Delete	120	Conference Benevolences
Edit Delete	140	Ministerial Education
Edit Delete	160	Black College
Edit Delete	200	Africa University
Edit Delete	210	Interdenominational Cooperation
Edit Delete	220	General Administration
Edit Delete	230	Jurisdictional Administration
Edit Delete	240	Area and Conference Administration
Edit Delete	250	District Administration
Edit Delete	260	Pension and Benefit
Edit Delete	270	District Superintendents'
Edit Delete	280	Episcopal
Edit Delete	290	Equitable Compensation
Edit Delete	500	Test
Edit Delete	700	Hispanic College
Edit Delete	test	test test test

- When the row expands, update the necessary information, then click the **Update** hyperlink.

Funds List

	Fund Number	Fund Name
Edit Delete	100	World Service
Edit Delete	101	New Fund
Edit Delete	120	Conference Benevolences
Edit Delete	140	Ministerial Education
Edit Delete	160	Black College
Edit Delete	200	Africa University
Edit Delete	210	Interdenominational Cooperation
Edit Delete	220	General Administration
Edit Delete	230	Jurisdictional Administration
Edit Delete	240	Area and Conference Administration
Edit Delete	250	District Administration
Edit Delete	260	Pension and Benefit
Edit Delete	270	District Superintendents'
Edit Delete	280	Episcopal
Edit Delete	290	Equitable Compensation
Edit Delete	500	Test
Update Cancel	<input type="text" value="700"/>	<input type="text" value="Hispanic College"/>
Edit Delete	test	test test test

- The changes will appear immediately.

Funds List

	Fund Number	Fund Name
Edit Delete	100	World Service
Edit Delete	101	New Fund
Edit Delete	120	Conference Benevolences
Edit Delete	140	Ministerial Education
Edit Delete	160	Black College
Edit Delete	200	Africa University
Edit Delete	210	Interdenominational Cooperation
Edit Delete	220	General Administration
Edit Delete	230	Jurisdictional Administration
Edit Delete	240	Area and Conference Administration
Edit Delete	250	District Administration
Edit Delete	260	Pension and Benefit
Edit Delete	270	District Superintendents'
Edit Delete	280	Episcopal
Edit Delete	290	Equitable Compensation
Edit Delete	500	Test
Edit Delete	750	Hispanic College
Edit Delete	test	test test test

ADDING A NEW FUND

1. Click the **Add New Fund** button.

[Edit Assignments](#) [Upload Remittance](#) [Transfer Remittance](#)

Funds List

Add New Fund

2. Enter the **Fund Number and Name**, then click the **Add Fund** button.

Funds List

Fund Number:

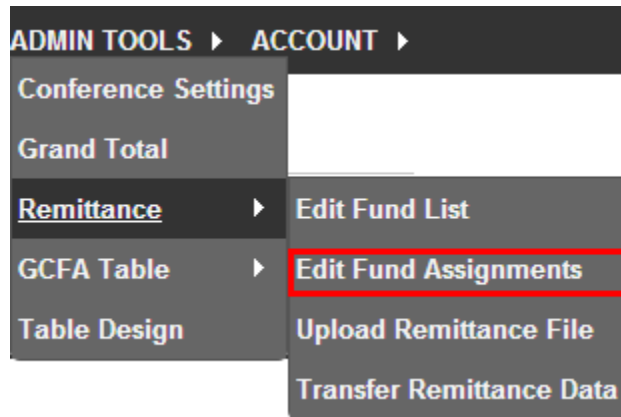
Fund Name:

3. The new fund will appear on the table.

	Fund Number	Fund Name
Edit Delete	100	World Service
Edit Delete	101	New Fund
Edit Delete	120	Conference Benevolences
Edit Delete	140	Ministerial Education
Edit Delete	160	Black College
Edit Delete	200	Africa University
Edit Delete	210	Interdenominational Cooperation
Edit Delete	220	General Administration
Edit Delete	230	Jurisdictional Administration
Edit Delete	240	Area and Conference Administration
Edit Delete	250	District Administration
Edit Delete	260	Pension and Benefit
Edit Delete	270	District Superintendents'
Edit Delete	280	Episcopal
Edit Delete	290	Equitable Compensation
Edit Delete	500	Test
Edit Delete	700	Hispanic College
Edit Delete	test	test test test

EDIT FUND ASSIGNMENTS

1. To edit fund assignments, go to Admin Tools > Remittance > Edit Fund Assignments.



2. When the **Funds Assignments** page opens, click the **Add Fund Assignment** button.

Funds Assignments

A screenshot of the 'Funds Assignments' page. At the top left, there are two dropdown menus: 'Fund No.' with the value '201.....Volunteers in Mission' and 'Fund Name'. To the right of these is a button labeled 'Add Fund Assignment' which is highlighted with a red border. Below the dropdowns is a table with the following data:

	Fund No	App. Assign	Paid Assign	Percent
Edit Delete	201	0	CONFADV	100

3. After the **Add a Fund Assignment** window opens, select the value assignments from the dropdown boxes before entering the desired percentage. If the value being uploaded is paid only (no apportioned funds), simply leave the “Apportionment Value Assignment” blank and only assign the line to the “Paid Value Assignment” window. When finished, click the **Submit** button.

A screenshot of the 'Add A Fund Assignment' window. It has a title bar 'Add A Fund Assignment'. Below the title bar, there are two sections: 'Apportionment Value Assignment' and 'Paid Value Assignment'. The 'Apportionment Value Assignment' section has a dropdown menu with the value '26.b.....UMWORK.....Amount paid for local chur'. The 'Paid Value Assignment' section has a dropdown menu with the value '--Please Select the line to assign--'. Below the dropdowns, there is a text input field containing '100' followed by a '%' symbol. At the bottom right, there are two buttons: 'Submit' (highlighted with a red border) and 'Cancel'.

- A separate table on the panel lists the **Funds Assignment**.

Funds Assignments

Fund No. Fund Name Add Fund Assignment

700.....Hispanic College

	Fund No	App. Assign	Paid Assign	Percent
Edit Delete	700	UMWORK	UMWORK	30

Summary of Distributed Values

Fund No	Fund Name	App. Line #	App. Assign	Paid Line #	Paid Assign	Percent
101	New Fund		0	38	WSSPEC	50
101	New Fund		0	40z	TESTPD	50
700	Hispanic College	26.b	UMWORK	26.b	UMWORK	30

- To edit the **Fund Assignment**, click the **Edit** hyperlink to save.

Fund No. Fund Name Add Fund Assignment

700.....Hispanic College

	Fund No	App. Assign	Paid Assign	Percent
Edit Delete	700	UMWORK	UMWORK	30

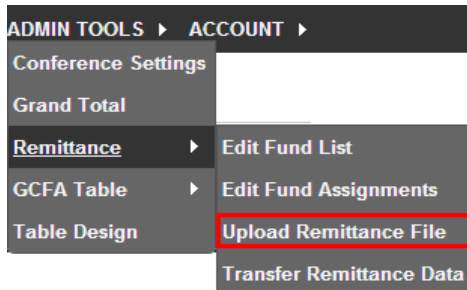
- Make the desired changes, then click the **Update** hyperlink to save.

Fund No. Fund Name Add Fund Assignment

700.....Hispanic College

	Fund No	App. Assign	Paid Assign	Percent
Update Cancel	700	UMWORK	UMWORK	40

UPLOAD REMITTANCE FILE



To upload the **Remittance** file, click the **Choose File** button; browse to the file, then save. The file will appear on the panel. Detailed instructions for how to format each file are available on this page.

Choose File Remittance File.xlsx

How would the value \$300.12 appear in the file you are uploading?

- 300.12
- 300
- 30012

What format did you upload your data in? (See format examples above.)

- Format A
- Format B

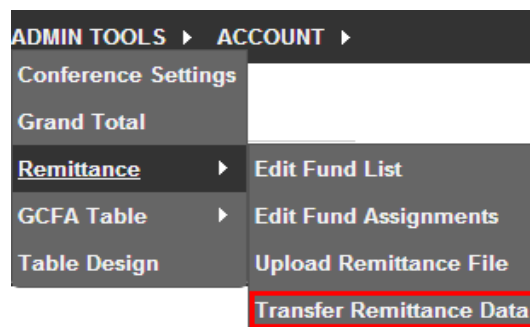
WARNING: This will upload your remittance data into 2013

Upload Data

If successful, you will see a sample of what was uploaded at the bottom of the screen. The information is not actually put into the tables, however, until you transfer:

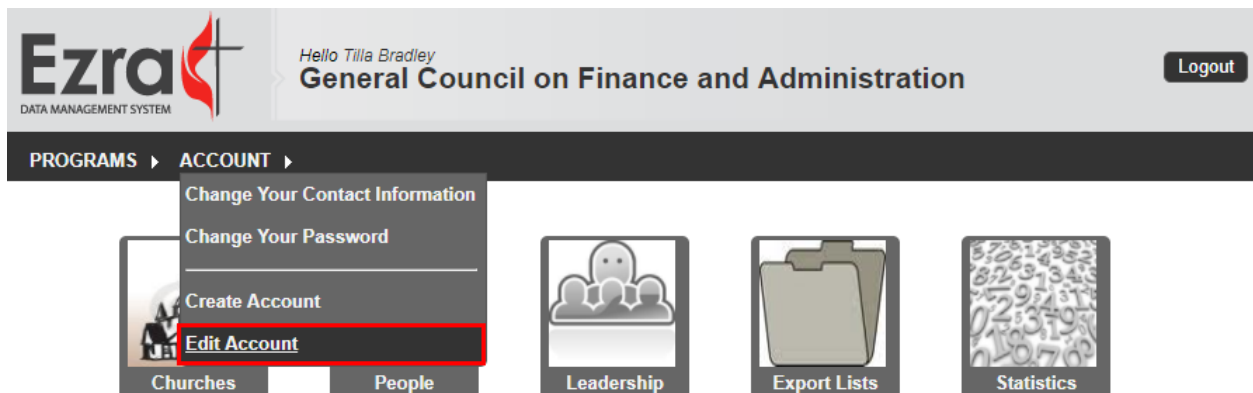
TRANSFER REMITTANCE DATA

Go to **Admin Tools > Remittance > Transfer Remittance Data** to transfer the values into the church tables.



UPDATING USER'S PERMISSIONS

1. Log in to Ezra, then go to **Edit Account**.



2. Search for the user using his name, email address, or assigned role.

Search Criteria

User Level: Conference District Church

Conference: District:

Username: Email:

First Name Last Name

Roles / Permissions:

3. Click the **Edit Assignments** hyperlink.

Search Results	User Details	
Church User	Username: fichurch	Email: <input type="text" value="dowens@gcfa.org"/>
	FirstName: <input type="text" value="Church"/>	LastName: <input type="text" value="User"/>
	HomePhone: <input type="text"/>	WorkPhone: <input type="text"/>
	Level: <input type="text" value="Church"/>	Conference: <input type="text" value="Florida (751)"/>
	IsFirstLogin: <input type="text" value="False"/>	ResetPassword: <input type="text" value="False"/>
	Type: <input type="text" value="Standard"/>	User Note: <input type="text"/>
	Stats Values: AccessingConfNo: <input type="text" value="Florida (751)"/> Can SelectConference: <input type="text" value="False"/> AccessingDistNo: <input type="text"/> Can SelectConfGCFAView: <input type="text" value="False"/> AccessingChurchNo: <input type="text" value="356094"/> View: <input type="text" value="Conf"/> Year: <input type="text" value="2017"/> Conn String: data source=AppSQLStage;initial catalog=Conf_751;persist security info=False;user id=AppSQLStage;password=Appw4SQL2Stage;packet size=4096;Max Pool Size=200	
	Assignments: Edit Assignments	
	Program Access: Edit Program Access	
	Central Database (Church Maintenance) Statistics (Can Create Users)	
	<input type="button" value="Unlock User"/> <input type="button" value="Delete User"/> <input type="button" value="Set Password"/> <input type="button" value="Save"/>	

Red = Locked Out

4. When the Set User's Assignments window opens, select the desired church or churches from the dropdown menu.

Set User's Assignments Conf

Select the church you need to assign to this user from the list below.

Select Church:

Current Assignments:

- Select Church
- 352030 Adullam Worship Center - Seffner in Seffner, FL
- 350394 Albright - St Petersburg in St Petersburg, FL
- 354745 Altoona in Altoona, FL
- 352520 Alturas in ALTURAS, FL
- 351321 Arlington - Jacksonville in Jacksonville, FL
- 352586 Asbury - Bartow in Bartow, FL
- 952776 Asbury - Jacksonville in JACKSONVILLE, FL

Login History:

- When finished, click the **Set Assignments** button.

- The updated assignments will show on the page. Click the **Save** button to save the changes.

SUBMIT

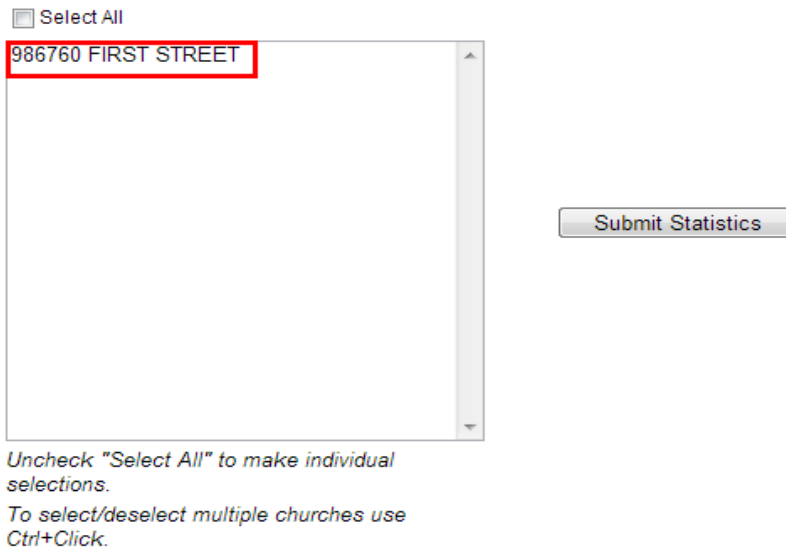
SUBMIT CHURCH STATS

If a church has completed all of its tables but not submitted them to the conference again, the statistics can be submitted by the conference.

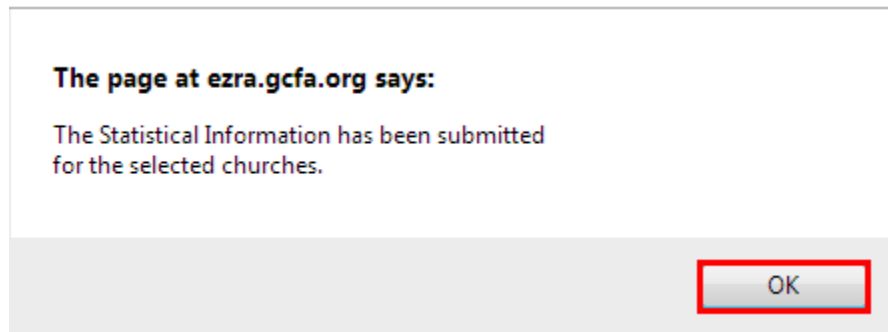
1. Go to **Submit > Submit Church Stats**.



2. The conference can submit a church's statistics if the church has saved all of its tables.

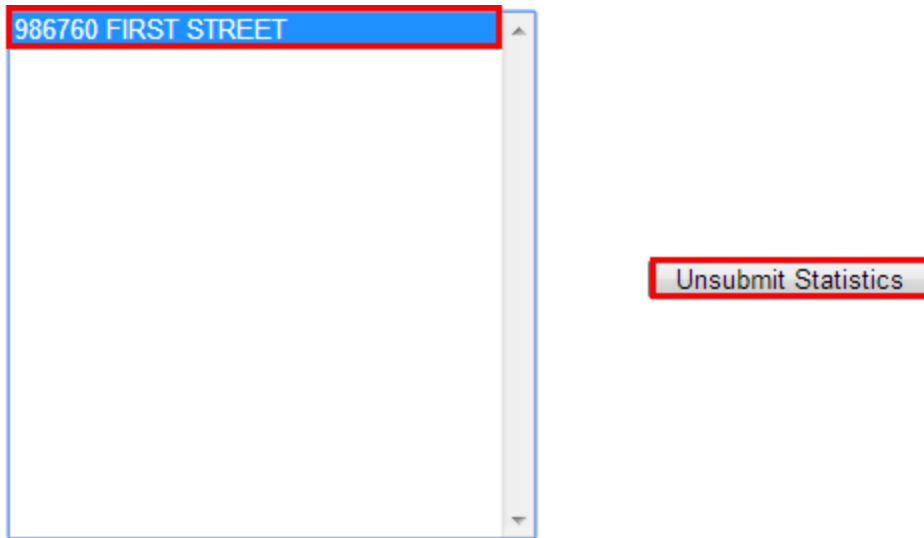


3. Click **OK** to confirm the submission.



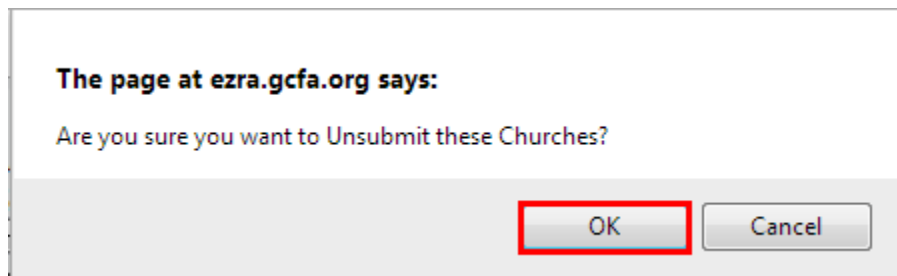
UNSUBMIT CHURCH STATS

1. Select the church or churches from the panel. Click the **Unsubmit Statistics** button.

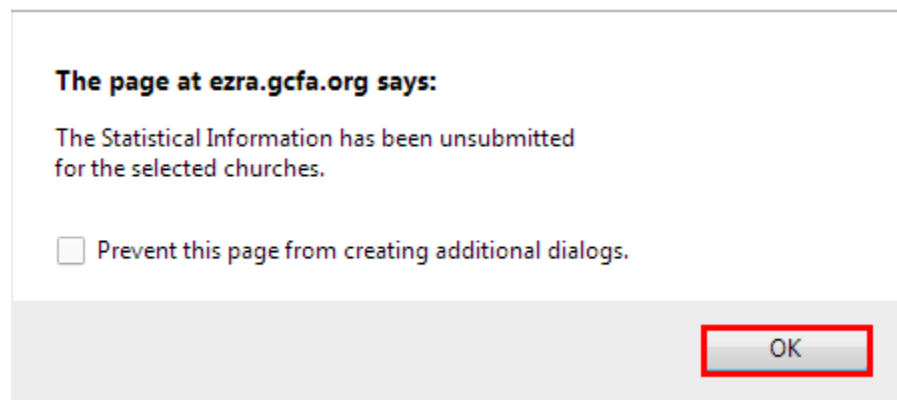


*To select/deselect multiple churches use
Ctrl+Click.*

2. When prompted, confirm that you want to unsubmit the churches by clicking **OK**.



3. Click **OK** after the change has been confirmed.



SUBMIT STATS TO GCFA

- To submit statistics to GCFA, go to **Submit > Submit Stats to GCFA**. This will open up a checklist to help ensure the data being submitted to GCFA is correct and complete.

Build GCFA Data Table

This is where you build the statistical table that will be submitted to GCFA. By clicking on the button below, you will build this table and then be able to see the data using the reports below. This will NOT submit the data to GCFA. Please go to the submit area to do this.

Roll Up Child/Satellite Church Numbers into Parent Church.

The GCFA Stats table has not been built.

[Build GCFA Table](#)

- Select the text of each Step to run reports and view information. Check off **Steps** that have been completed to change the status to **Completed** and assign the appropriate date and user. Once all steps have been completed, click the **Submit Statistics** hyperlink.

Step	Status	Date
Unsubmitted churches	<input checked="" type="checkbox"/> Completed	09/18/14 10:01:07 AM Lauren Arieux
Check for closed/merged churches with stats	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Check for missing/extra churches	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Check Error/Integrity Report	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Check Warning Report	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Check 2012 Ending Membership vs 2013 Beginning Membership	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Upload Remittance Data	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Transfer Remittance Data	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Grand Total Function	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
GCFA Control Table	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Build GCFA Stats Table	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
Verify Stats Going to GCFA	<input checked="" type="checkbox"/> Completed	09/18/14 10:00:58 AM Lauren Arieux
<p>Your statistical information was submitted by larieux on 6/5/2014. If you need to make a change please contact GCFA using the link below.</p> <p>Submit Statistics</p>		

3. Click **Ok** to confirm the information that is being submitted.

