Dear UUSIC group/committee leader,

Hopefully you've heard about our exciting new management software, Realm. This new program will allow staff and leadership to perform their duties more efficiently, but more importantly it will also provides a space for members to create profiles, join groups, and make online donations, and for groups and committees to share resources, track events and attendance, and communicate easily and quickly.

We are asking all group and committee leaders to:

1. Create a password and log in to Realm
2. Confirm or update your personal/family contact information and preferences
    a. Choose which information you would like to show up in the directory, and what you'd like to remain private for just the staff to access (you can change these settings at any time)
        i. Add individual and family photos to your profile (if you'd like)
    b. Set up online giving through your bank account or credit card if you previously had UUSIC automatically deducting your pledge or capital campaign contributions (or would like to begin to do so)
        i. We are encouraging members to use bank accounts (ACH) rather than credit cards to avoid losing a part of your donations to processing fees
        ii. The office will cancel all current automatic donations on June 30th, so members will need to set up new giving to begin starting July 1st if they wish to continue with recurring automatic contributions
    c. Become acquainted with our online directory
3. View and begin managing your group(s)-you should already be listed as the leader, alert the office if you are not
    a. Add your members
    b. Add resources and set up events
        i. Learn how to track attendance
    c. Learn how to send communications

For your convenience, we have drafted a quick start guide to assist with each of these steps. In addition, Realm has several resources including a detailed member guide and searchable support center. Of course, our administrative staff is here to help you with this process if you have any questions. Bailey Kelley will be available for office hours on Mondays from 9:30 until noon and Tuesdays from noon until 2:30. Feel free to stop by the Oakdale House, call her at 319.337.3443, or email uusic.assistant@gmail.com with specific questions or to schedule a one-on-one training session.

Realm Quick Start Guide for Group Leaders

1. Adding members to your group
    a. First, you need to find your group page. There are several ways to get there, but the easiest will be from your own profile page. Click on the “Groups” tab below your full name and find the group to which you’d like to add members.
    b. On the group page, click on the “Roster” tab. Click **Add Person**. Enter the person's name or select it from the list that displays as you type in the field. The person's name displays below the search field. You can add multiple members at once by continuing to search and clicking on names. If you accidentally select someone you did not want, you can delete them from the field by clicking the **X** beside their name. You will most likely want to add individuals as “members” rather than “guests.” Guests have restricted access to group information and resources. See the Realm support guide for a chart outlining member vs. guest access.

2. Editing group info
    a. From the group’s main page, click **Edit Info**. (Only accessible to administrators and groups leaders.)
    b. Update the fields as needed. You can also add a photo to the group page by clicking on “Add a Group Image” to the left of the group’s name.

3. Communicating with members
    a. Email
        - On the group’s main page, click **Send Email.**
        - Enter a **Subject** and **Message.**
        - Click **Send**.
        - Keep in mind that an email cannot be saved as a draft or viewed once it is sent. For long emails, consider drafting your message in Microsoft Word or another word processing program and then copying and pasting into the Realm email.
    b. Message boards: You can also post directly to the group page. Until our members become more familiar and regular users of Realm, we suggest using the email function as your primary way of communicating with group members.
4. Sharing resources
    a. Group leaders can post files and links (resources) such as meeting agendas, sheet music, or materials for study groups. Resources can be downloaded by members of the group and cannot exceed 20MB. When you add a resource to your group, an email is sent to the group’s members.
    b. From the group page, click the **Resources** tab. Click **Add Resource**, complete the fields, and click **Save.**

5. Creating events
    a. Primary meetings
        - Most groups meet regularly throughout the year. Use this function to set up your group's regular meeting times, whether weekly, monthly, or some other frequency. A group can only have one primary meeting, but you can change it once it has been set.
        - From the group's main page, click the **Events** tab. Click **Add an Event.**
        - Enter the **Event Name**, and check **Make this the group's primary event**. The Event Name displays on the group's Info tab.
        - For **Frequency**, select an option other than **Once**. Complete the remaining fields and click **Save**.
    b. Other events
        - Create
            - From the **Events** tab on the group's page, click **Add an Event.**
            - Complete the fields. Those with a red asterisk are required. For recurring events, choose the **Frequency** and enter a start and end date. For events that will recur indefinitely, select **No End Date.** Save the event.
            - Note: If you select **Require registration for this event,** it will become a Registration Event with additional requirements. At this point in time, we suggest not requiring registration for events until our members become more familiar with Realm.
        - Edit an existing event by clicking on and then **Edit**. Make the necessary changes and click **Save**.
        - Cancel an upcoming event by clicking on and then **Cancel**. You will be prompted to make selections about whether or not to send an email to group participants and whether to cancel all future events if this is a recurring event.
            - To cancel a past event, click on **Past** from the Events tab. Point to the appropriate event and click , then select **Did Not Meet**. The event will be greyed out on the Events page.
            - You can undo an event cancellation by clicking and then **Reinstate Event**. This automatically sends an email to all group participants telling them that the event is reinstated.
    c. Marking attendance for events: It is important to keep records of which group members have attended which events. Realm makes it easy to mark attendance for scheduled events, including regular meetings. Keep in mind that you can only mark attendance for events that have been created in Realm.
        - From the group's Events tab, click **Past**. (Events are available on this page one hour before they begin.) Next to the event, click then click **Mark Attendance.**

- Select the checkbox to the left of each group member who attended the meeting.Click **Add Person** to add new members or guests to the group roster.
    - You can also mark guests or non-Realm members by inputting the total extra present in the number box on the top right. If you also select Realm members individually, that box will include the total marked and additional.
- If you have entered attendance to the wrong event or need to clear attendance for some other reason, select **Remove Markings.** (This option only appears alongside events for which attendance has been recorded.) Select whether you want to remove the meeting from the events list and confirm that you want to clear attendance.
- If you would prefer to mark attendance in Realm after the event or meeting, you can quickly print out attendance sheets to use until you have time to input the information online. From the group page, click and select **Print Marking Sheet**. Select the print options you want and click **Export**. To open the PDF, follow the notification displayed by your browser.