

## The Michigan Conference Dashboard



The invitation to log in to the new Michigan Dashboard for the local church is initially being offered to persons who are recorded in the database as holding the positions below:

The Pastor or Pastors. All persons designated in the database as active Clergy, plus actively serving Certified Lay Ministers and District Superintendent Assignments.

- The Administrative Assistant. This overall position title refers to those whose workplace title may be Church Secretary, Office Manager, Executive Assistant, etc.
- The Staff/Parish Relations Chairperson.
- The Church Treasurer.

### Why Use the Michigan Dashboard for the Local Church?

#### *For the Local Church:*

- It keeps your leadership organized, accessible, and useful to you.

#### *For the District and Conference:*

- It makes it simple to communicate your church and leadership changes to us.

1. Like your car's dashboard, it **keeps all the facts right in front of you**. It is a place for you to collect, maintain, and access all the basic data about your church and its leadership.

2. It is **how you communicate with the Conference** about your church and its leadership. For example, because Conference leadership often works with your Church Treasurer and your Lay Member to Annual Conference, we need to know who those persons are and how to reach them.

Plus, if your church's email address, phone number, or Post Office Box number changes, you can edit those things yourself in your dashboard, and the main database will be automatically updated. Did you sell your parsonage and buy another one? Please add the new details. **You won't have to wonder who to notify**; simply make the change in your dashboard, and your District office and the Conference administration will see it.

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*If your church has previously utilized Ezra, there is already information residing in your dashboard. Everything from Ezra was imported into the new database, so you will immediately get a feel for how it looks and works when you see your own familiar information there.*



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*A good time to update your dashboard is immediately following your fall church or charge conference, when you have elected new leadership – and of course whenever leadership changes throughout the year.*

The Ezra database was discontinued in 2021 by the General Council on Finance and Administration, and so the Michigan Conference was required to also make a change. We chose to transfer our data using a company called Brick River Technologies, the same database provider we used several years ago. We have spent the first part of 2021 preparing the new church dashboard for your use.

## What's New?

### Old Ezra

- Login connected to church
- Pastors could not update their records
- Statistical report accessed with same Ezra login

### New Brick River

- Login connected to person
- Pastors can update their records
- Statistical report accessed in a separate website with a separate login

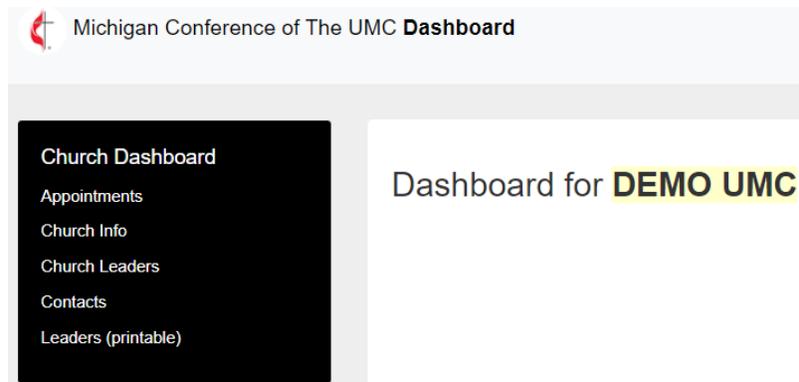
- User logins are portable; in other words, logins are connected to people, rather than to your church (as they were in the past.)
- Each person given access has their own login – no more sharing of passwords among staff.
- The pastor keeps the same login to the system no matter where they are appointed. And yet the pastor will be able to see only the church where they are currently appointed.
- In addition, pastors can now update their own contact information.
- Your Local Church Statistical Report to the Annual Conference, also known as Tables 1, 2, and 3, will no longer be accessed using the same login as your church dashboard. There will be a separate website for the statistical report. Information on that topic will be provided in a separate overview.

## GETTING STARTED:

1. Go to [www.portal.michiganumc.org](http://www.portal.michiganumc.org). Save it to your Favorites.
2. When the Sign In screen opens, click the link, “Need help logging in?” Since you serve in one of the designated positions listed in the first section, your email address should be already in the system, and you will be allowed to proceed. If you are an Administrative Assistant, you may be using the church’s email address.
3. A recognized email address will generate a return email with login instructions. The sender will be shown as, “Notifications at the Michigan Conference.” The subject line will read “Login Help.”
4. If you don’t see the email right away, please check your spam or junk mail folder.
5. If you get an error that says email not recognized, please try an alternate email address that you may have in the database, or simply ask for assistance: [pstewart@michiganumc.org](mailto:pstewart@michiganumc.org)

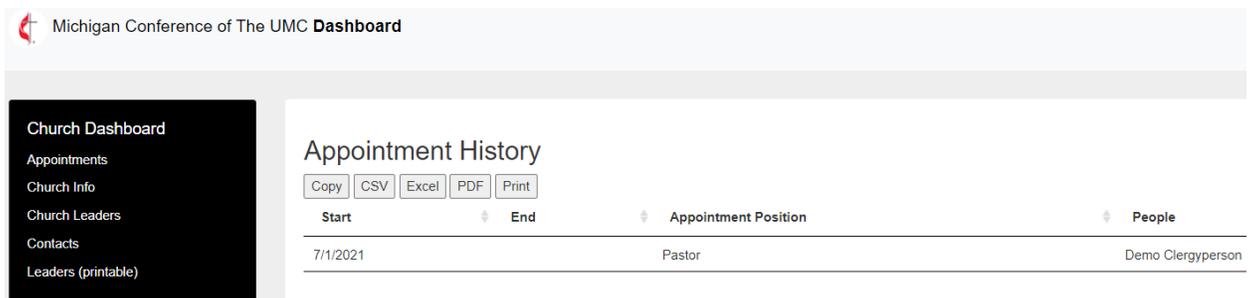
## How to Use the Michigan Dashboard

This hypothetical church called Demo UMC shows what the local church’s home screen looks like:



A short list of tabs on the left gives you access to edit your church’s information.

1. **Appointments:** The current pastoral appointment, and your church’s pastoral history, showing name, position, and dates of service. Since Demo UMC is a made-up church, only one pastor so far is listed. If your church has existed for many years, you will see a longer list of pastoral appointments here. *This part of the dashboard is Read Only.* Use the five tabs below the title to copy and paste, download, or print if you wish.



2. **Church Info:** This page contains email, phones, and address, as well as things like web address, service times, and parsonage information. (The example below shows only part of the page.) If you used your Ezra dashboard, some of these fields are completed because they were imported from the Ezra database. To make changes, click the green Update button at the top right and the fields will open for editing. Be sure to upload a recent photo of your church in the Image field!

Michigan Conference of The UMC Dashboard

DEMO UMC Log-out

Church Dashboard

- Appointments
- Church Info
- Church Leaders
- Contacts
- Leaders (printable)

### Church Information

Update

Primary Image



Church SHORT Name: DEMO UMC

Church FULL Name: DEMO UMC

Email Address: pstewart@michiganumc.org

Alternate Email Address: pstewart@michiganumc.org

Business Phone: (517) 347-4030 ext 4137

3. **Church Leaders:** All your church's leadership, including committee members, should be listed here; but at the very least, please list committee chairs. This page shows the name of the person, their position, their role on a committee, and the start and end dates of their service.

Michigan Conference of The UMC Dashboard

Church Dashboard

- Appointments
- Church Info
- Church Leaders
- Contacts
- Leaders (printable)

### Leaders

Add New Assignment

Edit leader assignments here. To edit contact info [go to this page](#).

Action	Assignment	Person	Start Date	End Date	Class
<a href="#">Edit Assignment</a>	LC - Administrative Assistant	<b>Geraldine Jones</b> 1313 First St Oldtown, MI gerry@gmail.com	07/01/2019		
<a href="#">Edit Assignment</a>	LC - Christian Education Secretary	<b>Pauline Schneider</b>	08/01/2021		
<a href="#">Edit Assignment</a>	LC - Disaster Response Chair	<b>John Jefferson</b> 231 21st St Uptown, MI johnjack@yahoo.com	08/01/2021		
<a href="#">Edit Assignment</a>	LC - Nominations and Leadership Development, Committee on Co-Chair	<b>Demo Clergy person</b> 1161 East Clark Rd. Suite 212 DeWitt, MI pstewart@michiganumc.org	07/01/2021		

- A. To remove a person from your list of leadership, select Edit Assignment to the left of their name, and then enter an End Date for their service. That takes them out of your view but does not delete them from the database, as they may wish to serve again at a later date.

**Assignment Dates** ▾

Start

**End**

- B. To edit an existing assignment, select Edit. Make the changes and save. If you need to edit contact information for a particular person, select either the “go to this page” link at the top or the Contacts tab on the left.

## Leaders

Edit leader assignments here. To edit contact info [go to this page](#).

- C. If you are adding a new person and assignment, select Add New Assignment. You will first select the position from the dropdown menu, for example, Lay Leader. The next screen will prompt you to select from the existing names in the list.

Michigan Conference of The UMC Dashboard

**Leaders**

1. PICK THE POSITION

2. PICK THE PERSON - LOOK AT PEOPLE IN YOUR CHURCH FIRST

<input type="button" value="Pick this person"/>	George Anderson	1616 16th St Midtown, MI
<input type="button" value="Pick this person"/>	Demo Clergyperson	1161 East Clark Rd. Suite 212 DeWitt, MI
<input type="button" value="Pick this person"/>	John Jefferson	231 21st St Uptown, MI
<input type="button" value="Pick this person"/>	Geraldine Jones	1313 First St Oldtown, MI
<input type="button" value="Pick this person"/>	Demo Layperson	4444 5th St Four Rivers, MI

- D. If the name is not there, scroll down the page to “Can’t find the person in your church?” If you search and the correct name pops up as you begin typing, select Pick this Person, and finish the assignment.

Can't find the person in your church? Search the whole database...

<input type="button" value="Pick this person"/>	<b>George Anderson</b>	1616 16th St Midtown , MI
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*Be careful to choose the correct name – for example, several John Smiths may appear. The address might be a clue.*

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## Finishing the Assignment

### Leadership Assignment

Save

People George Anderson

#### Assignment Dates ▾

Start 7/21/2021  Date  Time

End   Date  Time

Class of ⓘ

#### Church Leader Assignment ▾

Position LC - Lay Leader

Role

Office Types and Other Tags

Area of Responsibility ⓘ

Notes

- Enter the Start Date. If the End Date is known, you may enter it, too. When the end date is in the future, the assignment will automatically disappear on that date.
- The *Class Of* field refers to assignments that have a fixed term commitment, such as a four-year term. You would enter the year that the assignment ends.
- The *Position*, already chosen and shown, refers to the committee or stand-alone assignment.
- If a person is serving on a committee, they should also have a *Role*. For example, someone serving the Trustees may be the Chair, Member, Secretary, etc.
- Positions such as Lay Speaker, Treasurer, or Lay Leader stand alone and don't require a Role. (The LC prefix stands for Local Church-level assignment.)
- The *Office Types* field is mostly for District and Conference level assignments. You won't need to use this. You may make notations in the *Area of Responsibility* and *Notes* fields if you wish.

## More About Name Searches

If you know that Jennifer Jefferson should be in the database, but she doesn't appear, try entering only part of the name. Perhaps she is listed as Jen or Jenny Jefferson.

If the name you want cannot be found, you will be shown a tab at the bottom of the page to add a brand-new person. Fill in as many of the contact fields as you can and save. It is possible to save only a first and last name; but try to obtain at least an email address and a phone number to make the information more useful.

Can't find the person in your church? Search the whole database...

Jerry Jameson

Sorry, we did not find anyone with that LAST or FIRST name in our database

Still not able to find the person?

→ Add a brand new person to our database

When you search it is not necessary to use capitals.

If you are unsure of spelling, just begin typing as much of the name as you do know, and options will pop up.

You can try first initial and last name but be aware that common last names may return many results. Same with first name and last initial. Choose carefully from the options given.

When you are finished editing, you will see a section on the right where you can click on the words "I am Done!" This will signal to the Conference that you have made changes.

**Finished?** Please let us know.

I am done!

You last told us on Aug 02, 2021.



4. **Contacts:** This page shows your leadership in a usable format. You can download to Excel (tab at upper right) for use in a directory, a mail merge, an upload, or other uses. Names are linked so you can quickly edit a person's contact information. Or use the Edit button. If a person has left your church or seems to appear in error, click the field on the right titled, "Not in My Church."

Michigan Conference of The UMC Dashboard DEMO UMC Log

**Church Dashboard**

Appointments

Church Info

Church Leaders

Contacts

Leaders (printable)

### Contacts

[Download Contacts](#)

search church contacts

Edit	Contact	Email	Phone	Mailing Address	Not in my church
<a href="#">Edit</a>	<a href="#">George Anderson</a>	<a href="mailto:georgetrustee@gmail.com">georgetrustee@gmail.com</a>	MOBILE 616-444-4444	1616 16th St Midtown, MI	<a href="#">remove from my church</a>
Clergy are not editable					
	Demo Clergy person	<a href="mailto:pstewart@michiganumc.org">pstewart@michiganumc.org</a>	BUSINESS (517) 347-4030 MOBILE (555) 555-5555 HOME (444) 444-4443	1161 East Clark Rd. Suite 212 DeWitt, MI	
<a href="#">Edit</a>	<a href="#">John Jefferson</a>	<a href="mailto:johnjack@yahoo.com">johnjack@yahoo.com</a>	MOBILE 248-655-6555	231 21st St Uptown, MI	<a href="#">remove from my church</a>
<a href="#">Edit</a>	<a href="#">Geraldine Jones</a>	<a href="mailto:gerry@gmail.com">gerry@gmail.com</a>	BUSINESS (517) 555-5656	1313 First St Oldtown, MI	<a href="#">remove from my church</a>
<a href="#">Edit</a>	<a href="#">Demo Layperson</a>	<a href="mailto:pstewart@michiganumc.org">pstewart@michiganumc.org</a>	MOBILE (444) 444-4443	4444 5th St Four Rivers, MI	<a href="#">remove from my church</a>

5. **Leaders (printable):** Your data appears in a table format for printing your leadership information. You can also copy and paste to another document or export to CSV or Excel. The tab at top left allows you to print the entire page, including all the header information for Demo UMC. Note: the View Future Leaders tab refers to those whose start dates are entered for some time in the future.

[Print Page](#)

Date: 08/04/2021  
**DEMO UMC**

Street Address:  
1161 East Clark Rd. Suite 212  
DeWitt, MI 48820-8312

Mailing Address:  
1161 East Clark Rd. Suite 212  
DeWitt, MI 48820-8312

Church Phone: (517) 347-4030 ext 4137  
Church Email: [pstewart@michiganumc.org](mailto:pstewart@michiganumc.org)  
Church Website:

Church Number: 00000  
GCFA Number: T00001

Main Service Time: 10:00 am  
Summer Worship Time: 10:00 am  
School Time: 9:00 am  
Other Worship Time: 11:00 am Sundays Youth Service

**CURRENT Leaders ("required" listed first)** as of 8/4/2021 [View FUTURE Leaders](#)

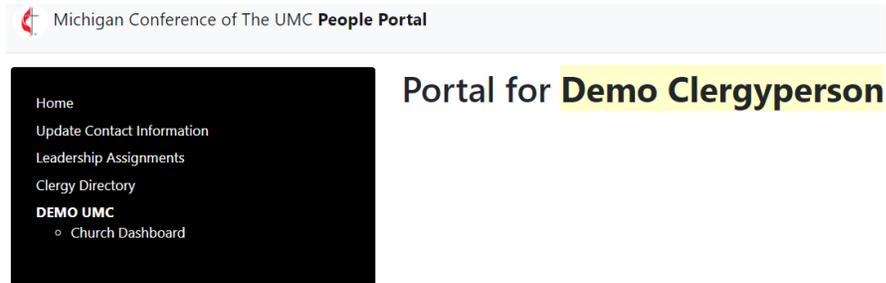
[Copy](#) [CSV](#) [Excel](#) [PDF](#) [Print](#)

TYPE	POSITION	PERSON	DATES	ADDRESS	PHONES
Required	LC - Treasurer, Church	<a href="#">Demo Layperson</a>	07/21/2021	4444 5th St, Four Rivers, MI, 44444	Business: Mobile: (444) 444-4443 Home:
	LC - Administrative Assistant	<a href="#">Geraldine Jones</a>	07/01/2019	1313 First St, Oldtown, MI, 44444	Business: (517) 555-5656 Mobile: Home:
	LC - Christian Education Secretary	<a href="#">Pauline Schneider</a>	08/01/2021	, , ,	Business: Mobile: Home:

## Pastors' Access to the People Portal

If you are designated as Clergy in the database, you will be able to see your own contact information and leadership assignments, as well as the directory of all active and retired clergy, with a link to the dashboard of the church(es) to which you are currently appointed.

To log in, use the same URL previously mentioned: [www.portal.michiganumc.org](http://www.portal.michiganumc.org).



- You may update your contact information as necessary.
- Leadership assignments are Read Only; if you have questions on these entries, please email [pstewart@michiganumc.org](mailto:pstewart@michiganumc.org).
- The Clergy Directory contains information on all Active and Retired Clergy in the Conference. (It is a large file and may take a moment to download.) The entries update every time a clergy person makes a change to their portal page. The directory is provided for your judicious contact of peers when necessary. Mailing addresses are shared; home addresses are not. To find a name, use the search bar at the top.
- The dashboard of the church you are currently appointed to is available from your portal page. Once you go to the dashboard, you will not be able to link back directly to your portal page.



### QUESTIONS?

[pstewart@michiganumc.org](mailto:pstewart@michiganumc.org)

517-347-4030 ext. 4137

Office hours 8 am – 4 pm M-F

I hope this overview is helpful to you. Please feel free to ask questions. If I don't know the answer, I will find out for you. And if you find something that doesn't seem to work right, please let me know. *Email is the best way to reach me!*

**Pamela Stewart, Database Manager**