


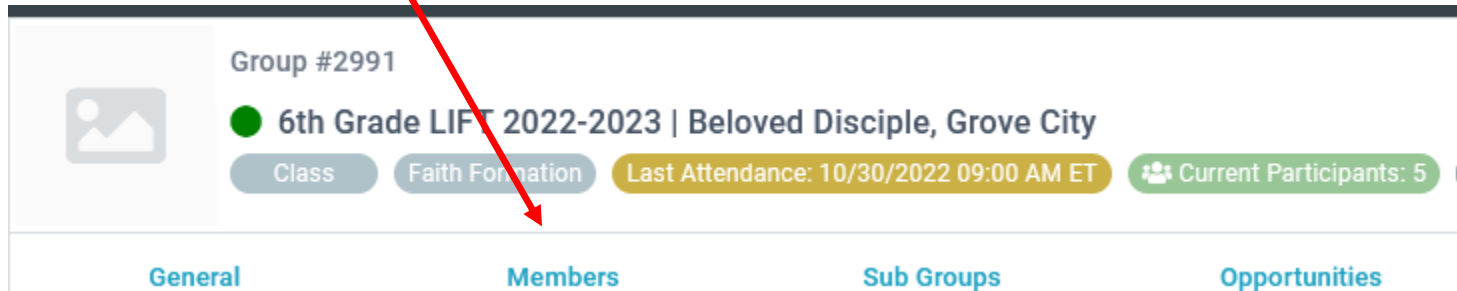


Ministry Platform – Groups

Adding members



1. Open **Ministry Platform** and click **Groups** on the left task pane.
2. Double click the group to which you need to add members.
3. Click the blue **members** link.



Group #2991

6th Grade LIFE 2022-2023 | Beloved Disciple, Grove City

Class Faith Formation Last Attendance: 10/30/2022 09:00 AM ET Current Participants: 5

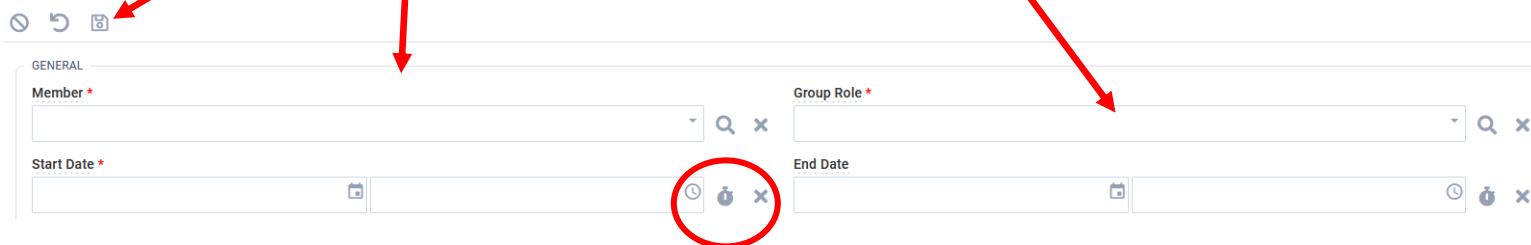
General **Members** Sub Groups Opportunities

Delete members

1. Open Ministry Platform
2. Click **Groups** on the left task pane.
3. Double click any group to which you need to add members.
4. Click the blue **members** link.
5. Check those members you wish to delete
6. Click **Actions** button.
7. Click **Delete** and **OK** to confirm.

Add one member to a group: Children and their families must be added to MP through the **Add/Edit Family** tool. They may already be there as a member of your parish or other parishes throughout the Diocese.

1. Open the group and click the **Members** link.
2. Click the **New Group Participant** button.
3. Click in the **member** field and type a name using this format: **last,first name**.
4. Choose **Group Member Participant** from the **Group Role** drop down menu.
Note: Add the Catechist with a **Group Role** of **Group Leader**.
5. Click the clock icon for the **Start Date** to populate the Date and Time fields.
6. Click the **Save** button (diskette button Sue refers to as a camera).



GENERAL

Member *

Group Role *

Start Date *

End Date

To add multiple members to a group

1. Open the Group and click the Members tab.
2. Click the **Actions** button (upper right) and click **Add Members**.
3. Click the **Magnifying Glass** next to Member to open a list of contacts.
4. Click the **magnifying glass** button in the **Display name** column to search for a member. You can also use the search boxes to filter for a specific criteria. For example:
 - Type **active** in **Contact Status** to find all of your active members.
 - Type **Registered** in the **Participant Type** to filter out non-members.
 - Type ***2013** in the **Date of Birth** column to find everyone born in 2014 for your 3rd Grade group.
5. Use the checkboxes to select multiple people or the select all check box at the bottom of the screen to selection everyone.
6. Click **Confirm** selection.
7. Choose **Class Member Participant** from the **Group Role** drop down menu.
8. Click the **clock** icon for the start date to populate the **Date** and **Time** fields.
9. Click the **Add** button at the bottom of the screen
10. Click the **Save** button (diskette button Sue refers to as a camera).

Allergies and Special needs (colored stars on screen shot correspond to matching color text.)

1. Click **Contacts** and find the member.
2. Click the blue **Attributes** link along the top of their record.
(Attributes are characteristics of a person that we need to record.)
3. Click the **New Contact Attribute** button to create a new Attribute.
4. Choose **Allergies and Special Needs**
5. Click the **clock** to enter a **Start Date**
6. Add **notes** pertaining to the attribute in the notes section

7. Click **Save**. (diskette button.)

The screenshot shows a software interface with a top toolbar containing icons for refresh, undo, and save (a diskette icon). A red arrow points to the save icon. Below the toolbar is a 'GENERAL' section with the following fields:

- Attribute**: A dropdown menu with the text 'Allergies & Special Needs | Personal Characteristics'. A blue star is positioned to the right of the dropdown.
- Start Date**: A date field containing '05/28/2022' and a time field containing '10:27 AM'. A green star is positioned to the right of the time field.
- End Date**: An empty date field.
- Notes**: A text area containing the text 'Allergy to Sulfa drugs' and 'Left knee cap can spontaneously dislocate while walking. Apply Ice.' A purple star is positioned to the left of the notes.