Realm Instructions

Updated: September 2020

Subjects covered in this resource include:

First Time Setup | Using Realm | Focus on Groups | Profile & Account Settings

Downloading & Using the Mobile App | Realm Online Documentation & Videos

We encourage everyone to create an account with our new Realm software system. Realm is available through both its website (https://onrealm.org/GraceRockHill) and the Realm Connect app. Realm is a great resource for everyone to maintain communications, calendar events and shared files. Realm is especially useful if you are on a committee or service group at Grace, since committee work sometimes happens remotely. Once you get the hang of using Realm, we know you'll see many ways Realm can help Grace provide better ministry, fulfilling our Mission.

First Time Setup

When people join Grace as New Members, we send them an invitation via email to join Realm. However, these invitations expire after just 72 hours, so we are accustomed to sending more than one. If you need a new email invitation, then please contact our Parish Administrator. If you have made that request, but not received the email, please check your spam or junk folder. The email invites are automated, so they are identified as spam by some programs.
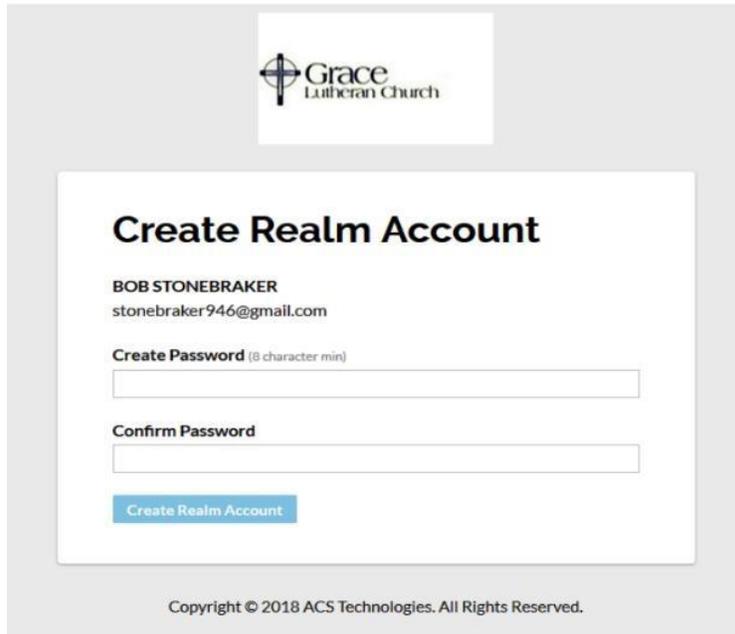

In the invitation email, you will find a link that allows you to create an account. When you click on the "Create Realm Account" link you will be directed to a page like the one below. Realm requests an email address - this will be your primary contact information, so be sure to use the address you use most often.

Next, you will be asked to create a password. It must be at least eight characters and have a mix of upper and lower-case letters and numbers or symbols. You may want to write this down or save it somewhere for reference. If your password is acceptable, you will see a small green check to the right of what you typed. If not, you will see a red marker.

When you have set your password, click on the blue "Create Realm Account". This will put you into Realm and you will be directed to the "News" page that will look like:
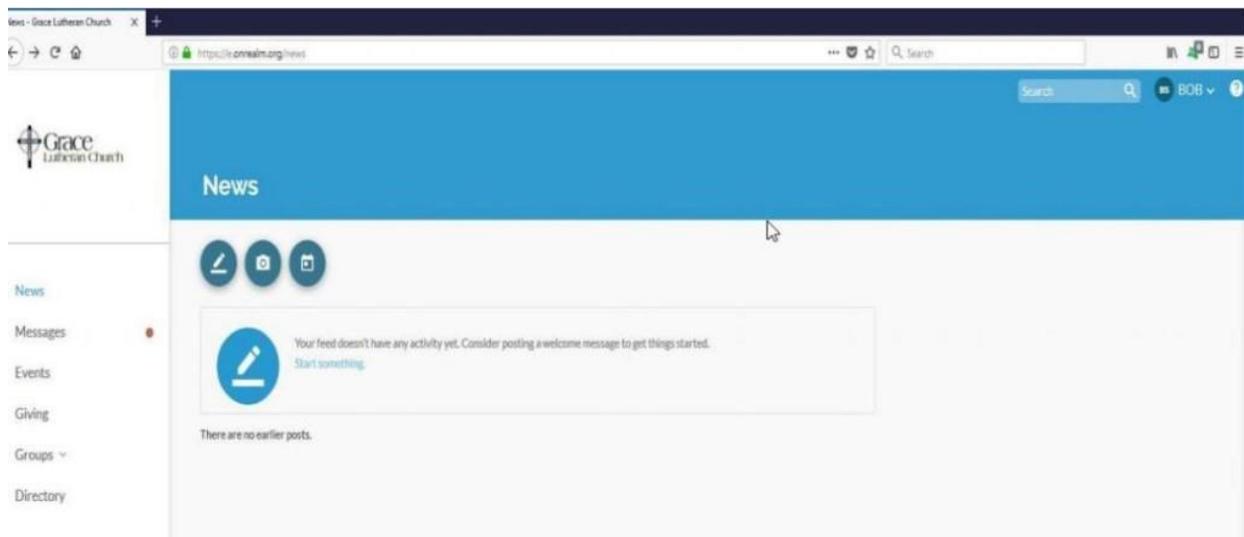
Using Realm

Log into Realm at https://onrealm.org/GraceRockHill.

The "Community" area of Realm represents the social media portion for church group communications. Realm will default to the "News" page and will display any recent news posted to any of the Groups in which you are a participant.

The left menu pane shows the available Community functions:

"Messages" will display any messages that have been sent to you and is where you can send messages to other members without needing their email address. Once a message is sent the recipient will receive an email they have a message on Realm and also a notification on their smartphone if they have the Realm Connect app.

"Events" will show any calendar events posted for the congregation or for any of the groups you belong to. If you belong to multiple committees, having the Committee meetings as calendar events makes it easy to remember when they occur. If you respond to an event that you will be attending, you will receive an email reminder the day prior to the event.
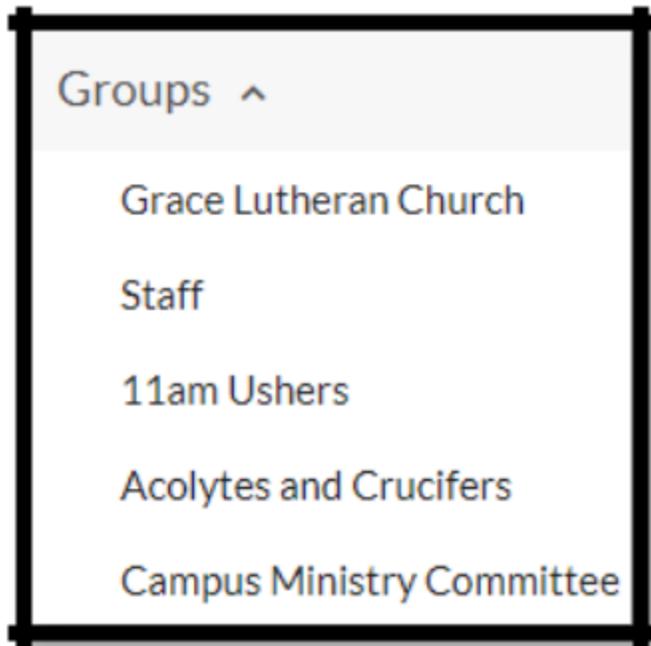
"Giving" will show your current giving to the church. The default setting shows your giving for the current calendar year, but if you click on the "funnel" shaped icon above the "year to date" indicator, you can filter the results to show different date ranges going back to 2008. The print icon will allow you to download a pdf of the giving record that you can print. The right pane will show your current and past pledges. Once a pledge campaign is active, you can update your pledge as well.

> NOTE: The only people who can access your giving records are the Parish Administrator, the Financial Secretary, the Assistant Financial Secretary, and anyone else whom you designate.

"Groups" will list the groups you have joined since your account became active on the Realm. You can request to be added to a new group at any time (contact the Parish Administrator). Every member is a part of should have "Grace Lutheran Church" as a group. The Groups section really is the 'heart' of Realm. For that reason, we will soon cover a dedicated section called "Focus on Groups" that includes much more detail.

"Directory" lists all active Grace members. Clicking on a member's name should pull up a page with contact and personal information that that person allows you to see. To send a message to the person, click the "Message" icon under the person's name and follow the prompts. NOTE: only Realm users whose privacy settings reflect "Everyone in Our Church" will have their contact information show in the Directory. **We strongly recommend and request that you have your privacy settings set in this way.** Refer to the Manage Privacy section for instructions to update your privacy setting.

Focus on Groups

Groups ︿

Grace Lutheran Church

Staff

11am Ushers

Acolytes and Crucifers

Campus Ministry Committee

While Facebook is the social media tool for *individuals,* Realm is the social tool for Groups. Realm is focused on making church groups work better through communication leading to improved ministry. You can quickly access your groups by expanding Groups in the left navigation pane and selecting your group of interest.

Endowment Committee ...

News   Participants   Files   Attendance   Info
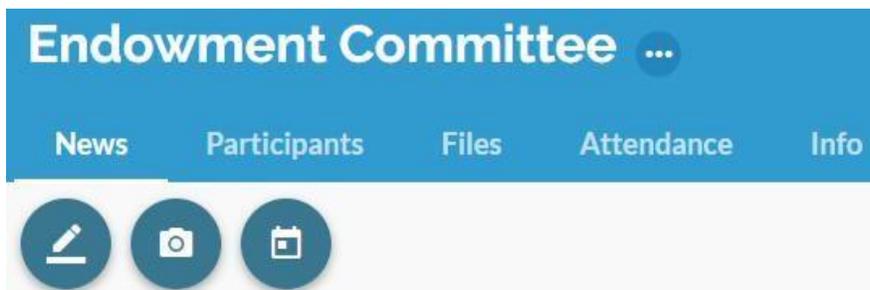
When in a group page (such as Endowment Committee, shown above), there are many functions available to members of the group. Use the three circular icons to add a new post, add a photo or add a calendar event. There are five Group tab menu functions described below.

"News" is the tab that will show all the posts and events activities (the most recent activities will be shown at the top of the list, after you click). Select any of the posts or events to see all of the replies from other group members. This is also where *you* can reply with a post and add to the discussion. If you attach a file to your post then the file will show both within your post as well as the Files tab.

"Participants" is the tab that will show all the members of the group. If you are a Group Leader then you will have additional information for each participant as well as a "Manage participants" button to add or remove a participant.
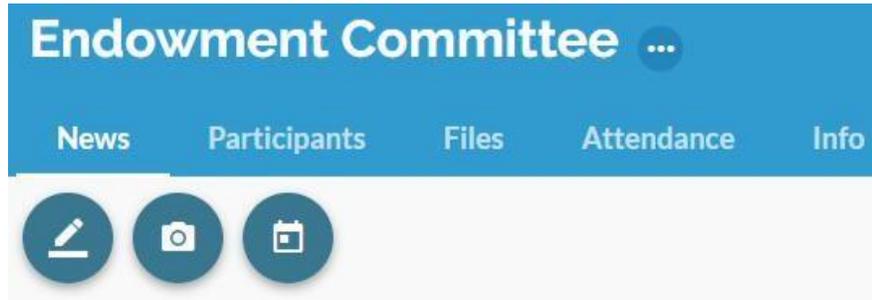
"Files" is the tab that provides a central place to share files within your committee. As an example, the Endowment Committee shares files for the 1923 Grace Society brochure, the Grace Endowment logo, excerpts on Endowment from the Constitution and information about maintaining the 1923 Grace Society plaque. This way, Committee information is always available for all current committee members even if the author of the file leaves the committee.

"Attendance" is the tab that provides an optional feature, allowing groups to track attendance for each committee meeting or individual events. Typically, only a Group Leader would have rights to take attendance on Realm. In order to take attendance, one must first setup a calendar event. Those events will show under the Attendance tab after the date of the event. All group participants are shown so the Group Leader can check the members that attended. Each event that had its attendance marked will remain under the Attendance tab for reference.

"Info" shows the description of the group and lists the Group Leaders. It also provides a quick glace of the amount of recent activity in the group.

Profile & Account Settings

You can update your profile and account settings by selecting the drop-down menu from the person-shaped icon in the upper right corner (as shown in the screen shot to the right). This is where you can update your personal contact information at any time. Updating your information here will also update the membership database used by the church office.

It is important that you review and update your Privacy and Email Settings. Email Settings is where you select the frequency of your email notifications for each Group that you belong.

My Profile – Select "My Profile" to review your contact information.
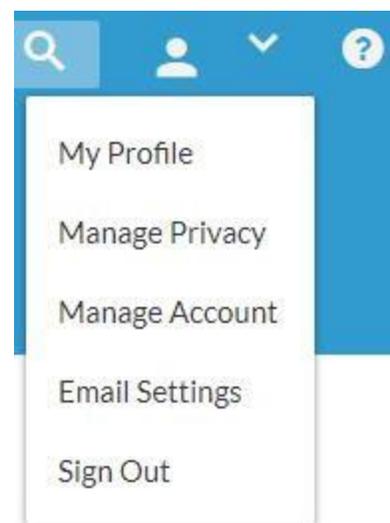
Then select "Edit Profile" to edit any of your contact or personal information.

There is a "Contact Information" tab and "Personal Information" tab.

Contact Information – select the "Contact Information" tab if not already selected. Edit any of your contact information shown as needed. Press "Save" at the bottom of the screen. Your updated contact information will be used by the church office for all church communications. By updating your information in this way, you can maintain your family's current contact information without having to contact the church office. This information is used for the church directory and church mailings and emails.

Personal Information – select the "Personal Information" tab to update your Time & Talent survey selections. This is where we include information from those surveys typically completed in the first couple of months of the year.

"Manage Privacy"

Privacy here refers to your contact information such as address, phone and email address that is shown to other members on the Grace Lutheran Church Realm site. No one outside Realm could ever see this information on Realm. By default, your privacy settings are set so only Group Leaders + Church Staff can see your contact information.

It is important that you change your privacy setting to "Everyone in Our Church" so your contact information is available to everyone in the Realm Directory. This will make the Directory much more useful to everyone. All church members already have access to this information though the hardcopy church directory. Enabling others to see your contact information on Realm is not a threat to your privacy but a tool for better member-to-member communication.

"Manage Account" – this is where you can change the password for your account.

"Email Settings" – this offers some important options. Here you can personalize the frequency of email notifications for each group that you belong. NOTE: It is recommended to select "All content and replies" for each group so you don't miss any group communications. Your selection here will affect how often you see what is going on with Grace's Realm page.

"Sign Out" – this allows you to log out of Realm. However, if you do not sign out, Realm is designed to keep you logged in as a convenience so you will not have to sign back in the next time you open Realm (your browser and other security settings may affect whether this is possible or not).
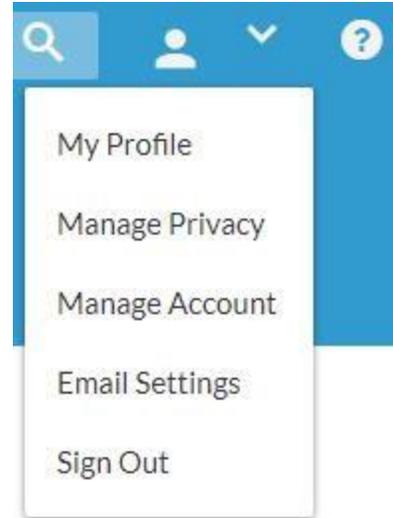
Downloading & Using the Mobile App

Using the free Realm Connect app on your mobile device will significantly improve communications of all Realm posts and calendar events for the Grace Lutheran Church group and all other groups in which you belong. Once downloaded, notifications are setup specifically for the mobile app. This means your settings for the mobile app are separate from the email settings in the web version of Realm.

You must first have setup a Realm account and confirmed you are able to login to the web version of Realm before proceeding. Your login credentials for the web version are used for the mobile app, too.

Download the app using your Apple or Android smartphone or tablet. *NOTE: If you have a large screen tablet, it may be better to use the web version of Realm, since the mobile app functionality can be limited at times. You may want to explore the differences for yourself, since updates to both the web version and the mobile app are ongoing.*

To download and setup Realm Connect app…

> Go to the App Store (Apple) or Google Play (Android). Search on "Realm Connect".

> Select and download the app
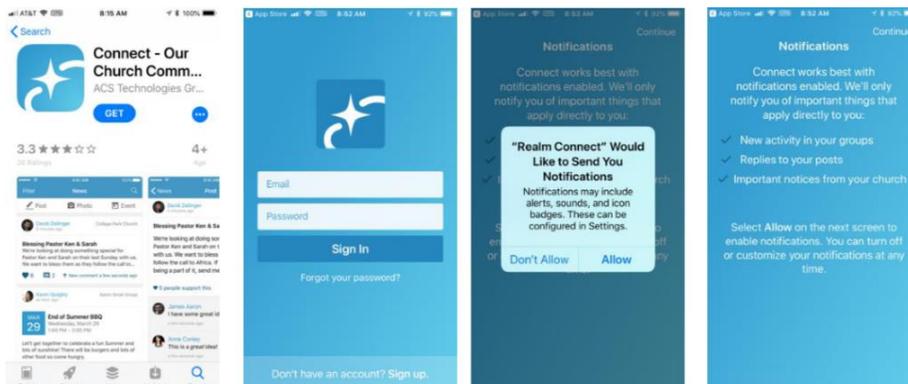
Open the Realm Connect mobile app as you would any other app and enter the same login credentials used in the web version of Realm. If you enter incorrect login credentials, you may be prompted for an invite code. If you receive that prompt, go back to the login and re-enter the correct login credentials. Remember that your username is the email address used to setup your Realm account. If you do not remember the email address you used to create your account, you can always contact the Parish Administrator for assistance.

Once you have access into the Realm through the mobile app, it typically does not prompt for login credentials again. Going forward, each time you open the app it will go directly to your News feed.

You can alter your Notification Settings for your groups.

At the bottom of the app screen, select "More" > Settings.
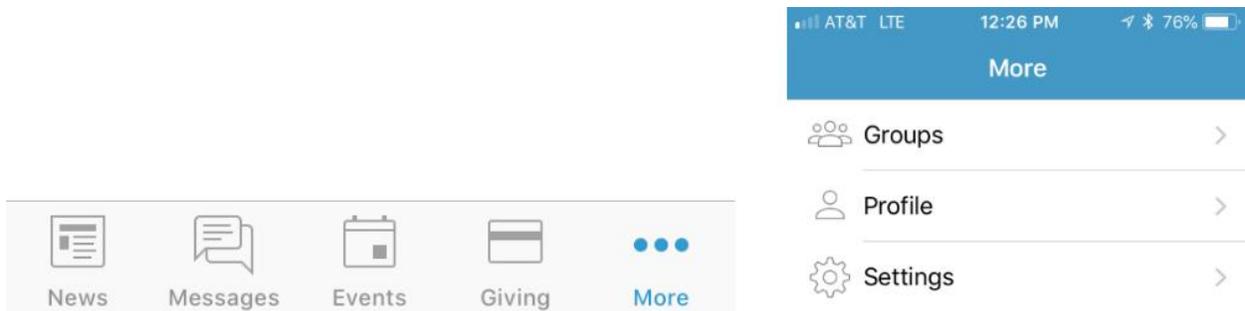
Your Group Notifications are shown listing all your groups. Select a group and then update the level of notification to either "All content and replies", "New content only" or "Nothing". If you are active in the group then it is recommended to set the notification to "All content and replies" so you get all communications instantly for your group.

News	Messages	Events	Giving	More
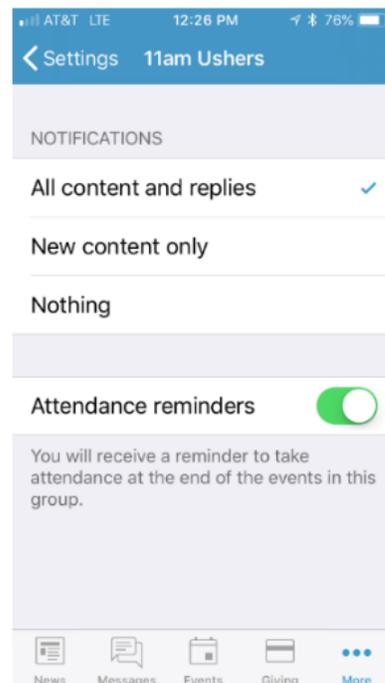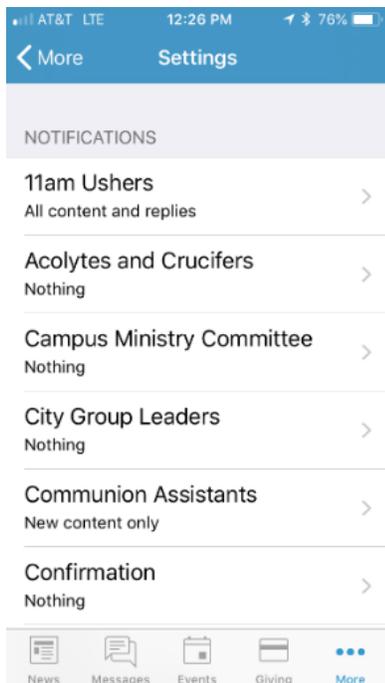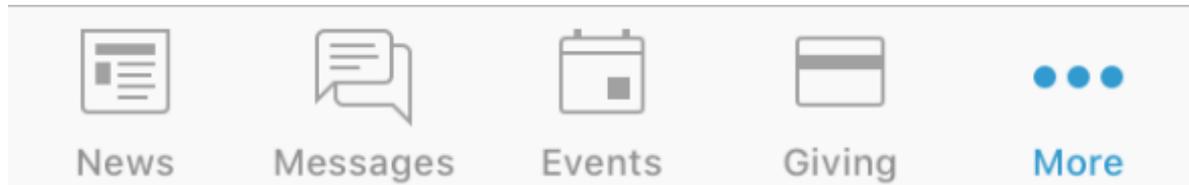
You can use the app through the News, Messages, Events & Giving icons at the bottom of the screen.

 "News" – News provides the most recent activities for all your Groups. If you have new activity it will show the number of new postings in a red circle by the icon. You can select any of the new posts and reply from there.

- o Post – If you need to start a new post for one of your groups then select the Post icon at the top of the "News" screen. Select the group you want to submit your new post. If your post is to multiple groups, then enable the "Post to multiple groups". Enter a title and content and press "Post" when done.

- o Photo – Likewise to posts, you can select one or multiple groups to upload a photo. Realm will ask you to allow it to access your photos. Select OK and then select your photo for upload.

- o Event – You can add calendar events to any of your groups. Typically, you are a group leader to add a new event. Enter the event Title, details, Start Time, End Time and Location. You also have the option to setup a recurring meeting by selecting a Frequency. You can select weekly, every 2 weeks or monthly based on the Start Time.

"Messages" – Messages provides a way to send a note to specific people at Grace. Even if they do not have a Realm account, Realm will send an email to address we have in our files, so that they get your message. The advantage of using Messages instead of email is that you never have to remember an email address! You just start typing their name and the matches will pop up for you to select.

"Events" – These are calendar events for all your groups. An event could be a congregation-wide event posted by the church office or it could be a committee meeting posted by the committee chair. Events provides an easy way to organize all the meetings you are invited to attend. If you respond that you will attend an event, then Realm can send you a reminder the day prior to the event. Note that the Events section is where you can review all events that have *already* been setup. If you need to create a new event, then you would do that in the News section.

"Giving" – Giving will show both your history of gifts and pledges going back to 2008. Giving is integrated with the ACS Finance module to provide your giving history in a secure manner.

NOTE: The only people who can access your giving records are the Parish Administrator, the Financial Secretary, the Assistant Financial Secretary, and anyone else whom you designate. If you have a question about your giving, please contact one of these people.

Realm Online Documentation & Videos

For more information on using Realm, you can always contact us at the church office. Or, if you would prefer to do a little exploring on your own, please refer to the ACS Technologies Realm website for extensive online documentation and training videos. Here are some quick links to recommended help content on Realm…

Overview – high level description of Realm with 1:16 minute video

Self-Guided Tour – series of videos to introduce you to Realm and highlight different ways it can support our ministries. Recommend setting aside 30 minutes for the tour.

Congregants Help – Help documentation for common Realm user functions

Group Leaders Help – Help documentation focused on Group Leader functions and privileges to maintain their group.