

## Realm Profiles

Created by Peter Todd on 7/28/21

This document contains details on how to update your Realm profile.

Each user in Realm has a unique ID and profile. The profile contains contact information, personal information, groups you are a member of, and the list of people in your family. Most of this information came over from the old church management system Church Life / MemberLink but we would like you to review it and update it where necessary.

Your profile contact information will be in the Realm directory and available for viewing by all other Realm users at First United Church of Oak Park. You have control over setting who has access to your personal information. We recommend making your personal information ( just your birthday, sex, marital status and allergies) also available for viewing by all other Realm users at First United Church of Oak Park. Instructions on how to configure your privacy settings are below.

If you have any questions or comments, or you can send an email to [Membership@FirstUnitedOakPark.com](mailto:Membership@FirstUnitedOakPark.com) or call Heather Vanderberg at (708)386-5215 Ext 100

### Updating your Realm Profile

1. **Log into Realm** on your computer by entering URL 'onrealm.org' in an internet browser like Google Chrome, Microsoft Edge, Apple Safari and entering your ID (your email) and password. If you are having trouble, take a look at the document titled 'RealmLoginTraining.docx' or the YouTube training video titled 'Realm Login Training' for logging into Realm.
2. **Press the down arrow** next to your name in the upper right corner and select 'My Profile'
3. **Press the 'Edit Profile' button**
  - 3.1. Note that the new screen has two tabs: 'Contact Information' and 'Personal Information'. Edit the Contact Information first.
4. Edit the **Contact Information**
  - 4.1. Select the tab titled 'Contact Information'
  - 4.2. Scroll through all the fields containing your contact information and make edits were needed.
  - 4.3. Note the lock icons and the text to the right of it. This describes who can see this contact data you are editing. There is a section in this document below that discusses privacy settings.
  - 4.4. **PRESS SAVE** - None of your changes will be kept if you forget to do this
5. **Edit the Personal Information**
  - 5.1. Select the tab titled 'Personal Information'
  - 5.2. Edit the data if needed. Note the text next to the lock icon shows who will be able to see this data.
  - 5.3. **PRESS SAVE** - None of your changes will be kept if you forget to do this
6. **Managing Your Privacy**
  - 6.1. Press the down arrow next to you name in the upper right corner and select 'Manage Privacy'

6.2. As you scroll through this screen notice the options to define who has access to what information. At the top of the screen, there are four radio buttons:

- 6.2.1. 'Anyone in the church' – This group contains all Realm users at First United Church of Oak Park
- 6.2.2. 'Leaders & group/serving team members' – This group contains people who are team / group leaders and serving team leaders in Realm
- 6.2.3. 'Leaders' - This group contains people who are team / group leaders in Realm (for instance the Technology group leaders, Carl Nauert and Peter Todd)
- 6.2.4. 'Users with permission only' – This group contains the ministers and Realm administrators only

### 6.3. Recommended Option

6.3.1. We recommend that you select the 'Anyone in the church radio button'. If you are not comfortable with that option, see the next step 6.3.2 for setting a custom privacy configuration. Note that Realm does not show your birthday year. It just shows the month and day of your birthday. Realm also does not display your sex, marital status and allergies to standard Realm users in the church.

6.3.2. The last radio button is titled 'Custom Privacy'. The information that appears when you select this radio button has a drop down box under each profile item. In order to gain the most value from this church management tool, please make the following settings:

- 6.3.2.1. Home Address: Anyone in the church
- 6.3.2.2. Home Phone: Anyone in the church
- 6.3.2.3. Mobile Phone: Anyone in the church
- 6.3.2.4. Primary Email Address: Anyone in the church
- 6.3.2.5. Alternate Email Address: Anyone in the church
- 6.3.2.6. Personal Information: This is the content that you may not want to make available to anyone in the church. It includes your birthday, gender (male or female), marital status, and allergies. Note that Realm does not show your birthday year. It just shows the month and day of your birthday. Realm also does not display your sex, marital status and allergies to standard Realm users in the church. The ministers and Realm administrators will however be able to see your birthday year, your sex and marital status. Change the drop down box selection from 'Anyone in the church' to 'Users with permission only'.

6.3.3. **PRESS SAVE** - None of your changes will be kept if you forget to do this

## 7. Review family membership

7.1. Press the down arrow next to you name in the upper right corner and select 'My Profile'

7.2. Review the members listed under the text 'Family' which is just to the right of the block for 'Contact Information'. Note that if you click on the family member it will open up that persons Realm profile. If you notice that your family members need to update their profiles, please share this document with them and ask them to do so.

7.2.1. If you need to **add** a family member, press the 'Add family' button. In the popup window, add the Name, Relationship, Birthday and email of the person to add.

**7.2.1.1. Press Add**

7.2.2. If you need to **remove** someone from the list of family members, please send an email to [Membership@FirstUnitedOakPark.com](mailto:Membership@FirstUnitedOakPark.com) or call Heather Vanderberg at (708)386-5215 Ext 100.

## **8. Review membership in Groups**

**8.1.** Press the down arrow next to you name in the upper right corner and select 'My Profile'

**8.2.** Look at the block of text titled 'Groups'

8.2.1. This block shows all the Realm groups you are in and also shows if Realm thinks you are a leader of any of the groups. We are planning to review and update all the Realm groups and make sure the leaders for that group are accurate. Once that is completed, we are hoping to have the leaders go into Realm and update the list of members in the group they lead. If after a month or so from the day Realm is rolled out to all of the congregation, the groups data is still inaccurate, you can send an email to

[Membership@FirstUnitedOakPark.com](mailto:Membership@FirstUnitedOakPark.com) or call Heather Vanderberg at (708)386-5215 Ext 100 or contact the group leader and ask them to correct the situation.

8.2.1.1. To find out who the group leader is select 'Groups' on the left side column of links.

8.2.1.1.1. Select the group of interest

8.2.1.1.2. Select the 'Info' tab. A popup window will show who the leaders are and participation information.

## **9. Review your settings**

9.1. Before logging out, please do a quick double check that all the changes you made are as desired.

9.2. Press the down arrow next to you name in the upper right corner and select 'My Profile'

9.3. Look at the data in both the 'Contact Information' and 'Personal Information' tabs.

Notice the text next to the lock icon shows the privacy setting you defined above.

## **10. Log out of Realm**

10.1. Press the down arrow next to your name in the upper right corner and select 'Sign Out'.

Thanks for taking the time to make your Realm profile accurate.