

How to Set someone up in Unity to do a report:

To give someone access to completing a report on Unity, you first list them on Church Leadership and then set their Report Access under Charge Security.

Step 1: Add them to Church Leadership

Go to the Church Section. Click on Church Leadership. Type their last name in the Search Bar.

If they are already listed, go to [Step 2 below](#). If they are not listed, you need to add them to Church Leadership before you go further:

How to add someone to Church Leadership:

- a. Go to the **Church Section** for your church.
- b. Click on **Church Leadership**
- c. Click on **Add new leadership Position** at the bottom of the page
- d. Click **Select Position**
- e. Set **effective date**
- f. Click in the **New Officer block** and scroll down until you see their name. If you don't see their name, scroll to the very bottom of the list of names and click Add New Person. Enter their information and click Submit. For some positions you will need to set them up with an ID and password for Unity. Use their first initial and last name. For instance, LManley as the login. Then make up a password for them. You'll send them an email and tell them to go to unity.vaumc.org to log in.

Step 2: Add them to Charge Security

To add someone to Charge and/or Church Security so they can complete reports:

1. Go to the **Charge Section** for your church.
2. Click **Charge Security**
3. Click **Add New User**

4. **Choose their name** from the drop down menu

There are two sections shown. The first is for **Charge Access**. This is where you will give people access to things that are found in the Charge Section for your church. This includes Charge Conference Reports.

The second section is for **Church Access**. This is where you will give people access to things that are found in the Church section for your church. This includes the Annual and Weekly Stats, Profiles, etc.

The person can be given access to as many reports as they are responsible for.

5. **Choose what items they have access to, set the level, and then click Submit**

Click on the **Mixed Button**. You will see a list of various reports. For each report, you have a choice of what kind of access to give them. Your choices are No Access, View Access, and Add/Edit Access. For people doing a report, you would give them **Add/Edit Access**.

Some will need a password: If the person doesn't already have a log in and Password for Unity, it will ask you to set that up. Use their first initial and last name, not the email. For instance, LManley as the login. Then make up a password for them.

6. Fill in their contact info and click **submit** at the bottom. You'll send them an email and tell them to go to unity.vaumc.org and then log in. From there, they will choose the appropriate section and report they are completing.