

Charge Security: How to give someone access to a report in Unity

1. Make sure they are listed in **Church Leadership** under the *Church* Section.
2. Go to the **Charge Section** for your church.
3. Click **Charge Security**



This screen shows you who currently has access to which reports. Some reports are under Charge Section and some are under Church Section. If the person you need is listed, you can simply click Edit and then choose the new report.

4. If they are not listed, click **Add New User**.



5. A list of people associated with your church will show up. **Choose one**. If they are not listed, scroll all the way to the end of the list and you'll see (Add New Person).

New User

Select New User ←

Antioch - Charge Security

Please select the appropriate access level that this user should have to Charge functionality. If "mixed" is selected, access to individual functions ca selected.

No Access View Only Access Mixed (Select permissions) Full Access

Antioch UMC - Church Security

Please select the appropriate access level that this user should have to Church functionality. If "mixed" is selected, access to individual functions ca selected.

No Access View Only Access Mixed (Select permissions) Full Access

Submit Cancel

6. Once you have chosen the person, you then choose the report access level.

There are two sections shown. Click **Mixed** under each section to see reports. 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 all Charge Conference Reports. Here's a list of what is under Charge Access:

Edit Contact information and other properties for the Charge	<input checked="" type="radio"/> No Access <input type="radio"/> Access
Leadership Assignments	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Set/Edit Charge Conference Dates	<input checked="" type="radio"/> No Access <input type="radio"/> Access
Charge Conference Minutes	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Charge Conference Finance Report	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Charge Conference Trustees Report	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Charge Conference Staff/Pastor-Parish Relations Committee Report	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Annual Audit Fund Balance Reports	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Ministry Inventory Reports	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Charge Conference Declaration of Candidacy Report	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Charge Conference Nominations Leadership Development Report	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Ability to view/add other attached files	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
View Compensation Forms for appointed Clergy	<input checked="" type="radio"/> No Access <input type="radio"/> Access
View Continuing Education Forms for appointed Clergy	<input checked="" type="radio"/> No Access <input type="radio"/> Access
View Charge Conference Pastors Statistical Report	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Lay Servant Reports	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit

The second section is for Church Access. Here are the reports under Church Access:

Edit Contact information and other properties for the Church	<input checked="" type="radio"/> No Access <input type="radio"/> Access
View/Edit Church and Community Profile	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Leadership Assignments	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Year End Statistics for the Church	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Weekly Statistics for the Church	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Information Regarding Parsonage Status	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Information Regarding Cemetery Status	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit
Annual Audit Fund Balance Reports	<input checked="" type="radio"/> No Access <input type="radio"/> View Only <input type="radio"/> Add/Edit

The person

can be given access to as many reports as they are responsible for. Choose the level of access for the report.

6. Click **Submit** at the bottom of the page.

7. If the person needs access to Unity for a report and doesn't currently have a User Name and Password, the system will ask you to set up Log In Credentials for them.

For User Name, try to always use their first initial and last name. For instance, LManley as the User Name.

Then make up a password for them. 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 see the appropriate section for the report they are completing. When they click the section, only the report you've given them access to will show up.

SPPRC Chairs and Clergy Evaluations:

SPPRC Chairs are automatically given access to Clergy Evaluations by virtue of being listed as SPPRC Chair in Church Leadership. Clergy Evaluations are not on the lists under Charge Security.

So you don't need to give them access to the evaluation, but you still must give them access to Unity. You would follow steps 1 – 5 above. When you add them, the system will ask you to set them up with login credentials if they don't already have them.

Forgot Login?

If someone forgets their password, they should click on "Forgot Your Password" on the log in page. That should send them a reset. If they don't remember their User Name as well, contact the district office for a reset.