



The Cathedral of St. Andrew - Honolulu

The Very Rev. Walter B.A. Brownridge, Dean

ACCESS ACS and Online Giving

A User's Guide

What is ACCESS ACS, and who can use it?

ACCESS is a feature of our ACS computer system that has maintained the Cathedral's database of mailing lists and financial data for a number of years. ACCESS allows all members and regular attendees of the Cathedral to view and manage their own data, including setting up and managing online giving. In addition, there are capabilities for coordinating ministry groups and activities.

The only requirement for using ACCESS is that you must already be in the Cathedral's database, with a current email address on file. You will know that you're in the database if you receive occasional mailings from the Cathedral, or if you receive the eNews or notices of music events by email. If you're not certain whether you're in the database with a current email address, or if ACCESS doesn't recognize you, just send an email from the address you wish to have on file to contact.us@thecathedralofstandrew.org and we will ensure that you're properly entered!

ACCESS will let you do the following things:

- ★ View or update your member profile.
- ★ Add family and individual pictures to your member profile.
- ★ If you're a ministry group leader, print, view, or email members of your group.
- ★ View and respond to outreach opportunities.
- ★ Register online for events.
- ★ Make either single donations or contribute to your pledge online.
- ★ Search, review, and submit interest in serving opportunities in the church.

More features will be added in time, depending upon demand!

Logging in to ACCESS

We invite you to become an ACCESS user by going to the Member Login page and clicking on the "Need a login? Click Here!" button. Enter your email address and name as they appear in Cathedral records.

In the Account Sign Up screen, enter your first name, last name, and email address. The suffix field is optional. When you have entered the information, click the Find Me button. Note: Your First Name, Last Name and email address MUST match with our database or you will not be given an account. If you do not have an email address on file, then please email this information to contact.us@thecathedralofstandrew.org.

If ACCESS doesn't recognize your email address and name, email contact.us@thecathedralofstandrew.org with the information as you would like to use for this purpose, and we will adjust your records appropriately.

Member Login page:

Sign In

E-mail Address or User Name:

Password:

Remember my Username

[Forgot your password or user name ?](#)

Need a login? [Click here](#)

When you have successfully completed the Account Sign Up, you will receive an email containing your username and temporary password for logging in to ACCESS. When you have received it, return to the Member Login page and log in. You will be required to change your password on your first successful login to a password of your choice.

To protect your data, ACCESS requires that passwords follow these rules:

- ★ It may not contain parts of your user name or e-mail.
- ★ It may not include any of the following characters: < & > / \ ; % ' ,
- ★ It must contain two or more numbers.
- ★ It must contain both lower and upper case characters.
- ★ It must be over 8 characters long.

The system will also recognize you by a "User Name," which will be your first and last name from the Cathedral records, concatenated without a space (plus, of course, your password). Record your password in a safe place! If you forget your password, the Member Login screen will send you a temporary login so you can set a new one. However, it must be substantially different from your last two previous passwords!

Managing your personal data

Once you have logged in, you may view your personal data and edit it as you wish. You can even upload a photo, if you wish! Photos must be in .jpg format. You may also review your recent giving record. Unfortunately, giving records prior to 2014 are not available on ACCESS. If you edit any of your data, your edits will be registered in the database the next time the database is updated, which may be as long as a day or so.

Should you need assistance, click on the "More info" link in the upper right corner of the page, and ACCESS documentation will open in a separate window. If you need further assistance, click on the "Report a Problem" link and you will be able to write a message to one of us who maintain this system. We will try to help you as soon as possible!

Following is a brief discussion of how you may use the features and tabs presented to you.

Account Sign Up Screen:

Account Sign Up

Don't have a user name and password? Enter your information and click **Find Me**. An e-mail containing your login information will be sent to you shortly.

E-mail Address

First Name **Last Name** **Suffix**

Find Me

Already have a login? [Click here](#)

Home
Groups
Events
Giving

We will perform an enhancement release on March 11, 2014. Downtime is expected to begin at 10:00 PM EST, and we anticipate being back online by 6:00 AM EST March 12, 2014. Close

I Want to View...

[My Complete Profile](#) [My Giving History](#)

My Calendar Saturday, March 08, 2014

<< Previous Next >>

March 2014							April 2014						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
23	24	25	26	27	28	1	30	31	1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30	1	2	3
30	31	1	2	3	4	5	4	5	6	7	8	9	10

My Giving Summary

2014 Year to Date Giving \$675.00
 2014 Pledge Balance \$3,325.00

[My Giving History](#)
[Manage Scheduled Giving](#) Give Now

I'm interested in...

Tell us about your interests. Click **Select Interests** and let us know about the areas of our ministry you are most interested in. Select Interests

My Groups

Name	Action
Care of Community > Justice & Outreach	I want to... Go
Cathedral Life > Ushers	I want to... Go
Cathedral Life > Worship Committee	I want to... Go
Cathedral Life > Lectors	I want to... Go
Chapter > Treasurer	I want to... Go

Sample User dashboard

Home	
My overview	
	<i>Your dashboard, with access to main features of your records</i>
My profile	
	<i>Personal contact information, photos, social networking links</i>
My account	
	<i>Option to change your email, password, and social networking info.</i>
Groups	
My Groups	
	<i>Option to select ministry groups (not implemented yet)</i>
Events	
	<i>ACCESS calendar not implemented yet.</i>
	Calendar View
	Table View
Giving	
Give Now	
	<i>Set up a one-time or recurring donation</i>
Managed Scheduled Giving	
	<i>Displays the date and amount of your next scheduled contribution. From this tab, you can reassign payment methods, and edit or deactivate contributions.</i>
My Giving History	
	<i>See your YTD giving history and pledge history, starting in 2014</i>

Overview of member functions in ACCESS

Note that any requested changes to your personal data will not take effect until they have been accepted into the main database. This may take a day or two. Off-line giving (e.g., checks and cash gifts) will be posted approximately once a week.

Online giving

The Giving tab lets you set up, monitor and manage your giving to the Cathedral. If you have submitted a 2014 pledge, your progress toward that pledge will be shown, as well as any other gifts to special funds such as flowers or music.

Home
Groups
Events
Giving

Give Now

Manage Scheduled Giving

Gift
1

Funds
2

Payment Method
3

Review & Process
4

Receipt

How much would you like to give? ex: 50.00

How often would you like to give? One Time Recurring

When would you like to give?

[Continue >>](#)

My Pledge Detail

Giving Summary

Fund Name	Total Pledged	Contrib. YTD	Prv. Yr. Pldg. Pmts.	Balance	Progress
Pledge	\$4,000.00	\$675.00	\$0.00	\$3,325.00	17% <div style="width: 17%; height: 10px; background-color: #e91e63; display: inline-block;"></div>
Total	\$4,000.00	\$675.00	\$0.00	\$3,325.00	

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Online giving screen, showing a summary of giving to date.

This screen lets you specify either a one-time gift, or set up a recurring donation. The continuation screens let you specify the payment method (credit card or bank account direct transfer), as well as selecting the fund to which your donation should go. If you wish, you may distribute a single gift among multiple funds.

The online giving process is made up of five steps:

- ★ **Step 1** - Enter the gift amount and how often you want to give. You may select a recurrence pattern, from the options described in the table below.
- ★ **Step 2** - Select the funds you want to give to, from the list provided. You may divide a single or recurring give amount among multiple funds.
- ★ **Step 3** - Select a payment method. Supported methods include credit card or direct transfers from your bank account. Note: credit card payments incur an extra charge, which will be deducted from your specified gift amount, so that the Cathedral actually receives less than the full amount of the gift.
- ★ **Step 4** - Review and process your gift. Once a single gift is processed, it may not be cancelled. However, a recurring gift may be adjusted at any time.
- ★ **Step 5** - View and print your receipt

You must perform each step to complete the online giving process.

Recurring gifts

You may specify a gift to be given on a recurring schedule. Optional recurrence patterns include:

Weekly	Select this option to give the gift every week on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.
Every 2 Weeks	Select this option to give the gift every two weeks on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.
Monthly	Select this option to give the gift every month on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.
Every 3 Months	Select this option to give the gift every three months on the same day. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments.
Twice a Month	Select this option to give the gift twice a month on two dates you specify. Enter a Start Date for your gift, then select and enter an End Date or Number of Payments. The default 1st Payment and 2nd Payment dates are the 1st and the 16th. The gift is transacted on the first available date; if you enter the 5th and the 25th for the dates but it is the 10th, then the gift will not be transacted until the 25th.

If you set up recurring giving to occur on the 28th, 29th, 30th, or 31st of the month, the following rules apply:

Date	When Transaction Occurs
28th	On the 28th day of the month
29th	On the 29th day of the month, unless February or a leap year
30th	On the 30th of the month unless it is February.
31st	On the 31st of the month, or the last day of the month if it does not have 31 days.

If you set up recurring giving to stop on a day that falls within the scheduled frequency, the donation is still transacted. For example, if a recurring gift is set to end on the 30th of the month, the gift is made on the 30th even though it is the final day of the scheduled frequency.

Designating funds

When entering funds, keep these things in mind:

- ★ You can apply the entirety of the gift to one fund or divide the gift up among several funds.

- ★ Your total gift amount displays below the funds as \$<amount> of \$<amount> Remaining. As you enter amounts for funds, the total amount available decreases. For example, I start off with \$20.00 of \$20.00 remaining. I enter \$5.00 in the Van Fund. My new available gift now reads \$15.00 of \$20.00 Remaining.
- ★ You can enter an Optional Description for each fund you give to. For example, if I give \$100.00 to the Buildings and Grounds Fund, I can enter the Optional Description, “For the repair of the bird bath.”
- ★ You cannot proceed to the next step in the online giving process if the total of your funds is less than or more than your total gift amount you entered earlier. If you need to increase your gift amount, click Back and make the necessary changes.

Once you are satisfied with your funds, click Continue to select your payment method.

The following funds are available:

Fund	Description
Contribution - Plate	Contribution to the General Fund
Pledge	Contributions toward your current Pledge
United Thank Offering	A ministry to support mission and ministry throughout the Episcopal Church and in invited Provinces of the Anglican Communion in the developing world.
Concerts & Evensongs	Contributions toward music performed in concerts, Evensongs, and special services.
IHS	Institute for Human Services, Hawai'i's homeless shelter
ERD	Episcopal Relief and Development, a worldwide non-governmental charity
Christian Formation	Formation programs at the Cathedral
Archbishop Tutu Caritas Fund	Special worldwide justice and outreach ministries,
EFM	Education for Ministry program
Altar Guild	Candles, vestments, and other materials used in Cathedral services
Pastoral Alms Fund	Support for the needy in our parish and community
Foundation	The St. Andrew's Cathedral Foundation
Flowers	Altar flowers
Hospitality	Support of Aloha Hours and other parish gatherings and celebrations
Memorials	Gifts in memory of a specified individual
Thanksgiving	Special Thanksgiving offering, designated by the Bishop or Chapter
Christmas	Special Christmas offering, designated by the Bishop or Chapter
Maundy Thursday	Support of special services on Maundy Thursday
Good Friday	Support of special services on Good Friday
Easter Music	Support of special music for Easter Sunday
Easter	Special Easter offering
Bishop's Pastoral Fund	A charity designated by the Bishop
Capital Improvement	Major maintenance and repair projects
Buildings & Grounds	General maintenance and repairs
Bell Fund	Maintenance and support of the Cathedral's bells
WTOF Capital Campaign	Windows to our Future: capital maintenance of our building heritage

Once you have set up a gift, you may print out a receipt using the Print button on the screen. You will also receive an email acknowledgement of your gift.

Future instances of a recurring gift may be changed or deleted at any time, using the Managed Schedule Giving tab under the main Giving tab. Click on the pencil icon under “Actions” to modify the gift.

Home Groups Events Giving

Give Now Manage Scheduled Giving

Next Scheduled: \$75.00 on 3/9/2014 (Tomorrow) [Manage Payment Methods](#)
[Review My Giving History](#)

Giving Schedules - Active [Give Now](#)

Fund Name	Most			Frequency	Gifts Made	Amount	Payment Method	Actions
	Recent Gift	Next Gift	Last Gift					
Pledge		3/9/2014	12/28/2014	Weekly	0 of 43	\$75.00	Checking	 

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Manage Scheduled Giving

Site security

Please be assured that the confidentiality of your data is our utmost priority. Your data is only available online to you, unless you choose to subscribe to ministry groups managed in this web site. These groups will have access to your contact information only, not your giving record! With each item in your personal profile (phone numbers, email address, etc.), you may change it with the “edit” pencil and specify whether that information is to be listed or unlisted. You may mark all your information as “unlisted” by notifying us that this is your preference at contact.us@thecathedralofstandrew.org. Our software provider is ACS Technologies, the largest developer of church management software in the industry. The Cathedral’s data is housed in a secured data center maintained by ACS Technologies, and is subject to period security audits to ensure safety and privacy of your data.