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Background

The **Winkerk Online Module** functions independent from Winkerk 7. The **Winkerk Online module** is a web-based application that can be accessed from any device with a browser that is connected to internet. The website can be accessed from different browsers.

Introduction

When you log on to the **Winkerk Online website** you will see the following screen.

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**Login**

Sign in using your email address and password.

- **Email Address (or existing username)**
- **Password**

- [ ] Remember me
- **Login**

**Attention:**

Existing users must upgrade their accounts before being able to use WinkerkOnline. This involves switching from their current username and password to an email address as username and a user selected password. To do this, just log in with your old username and password then the system will guide you through the steps of upgrading to your new account.
When logged in to the website you will see the following screen.

The “Sinode” (Synod) section will only be visible if the logged-on user has rights to view the synod information.

The “Lidmaat” (Member) option will also only be available if the the logged-on user is also registered as a “member” user.

Please note that the only other options are "Gemeente" and "Gemeente Admin". Next to the logged-on users' name, is also a dropdown.

Where to start – Upgrade existing accounts

1. Upgrade your existing Winkerk Online Account.
   Due to new functionality in Winkerk Online all existing users (before Jan 2017) must re-register their accounts on the website. The process only requires the completion of additional information on the site.

   Users must first logon with their old Username and password for the system to identify them.
As soon as you click on "Login" the following screen will be displayed. Users must now enter their own email address. Please bear in mind that since the username is now replaced by an email address, do not use a generic email address for the congregation, but a separate email address for each user. **Users can also now specify their own passwords.** You can then click on "Upgrade Account".

An email will then be send to the email address that the user supplied. The next screen will then be displayed.
Users must then open their email and click on the link in the email.

After clicking on the link in the email the following screen will be opened.

2. Log into the new account using your **Email address** as username and your new password.
   
   Once logged into your new account, the “Congregation User” features will be available, except for the synchronization between Winkerk 7 and Winkerk Online. To be able to synchronize changes on Winkerk Online to Winkerk 7, you need to be a “member user” as well.

3. Use the dropdown next to your name to register yourself as a **Member User**.

   Click on the dropdown next to your name, and then click on “Link a Winkerk 7 member”. You must use this feature to link **yourself** as a **member user** on the system. For Winkerk 7 to link the
requested changes from the Winkerk Online website to the Winkerk 7 offline database you need to be registered as a member in the Winkerk 7 database. Only members on the Winkerk 7 database may request changes on Winkerk Online.

Click on the dropdown to choose your congregation, and complete your full names, surname, date of birth and your cellphone number. Then click on the “Request Member Link” button.

Once this is completed, you need to go to Winkerk 7.

There will appear numbers next to names of the "Data Request" and "Member Request" buttons. This numbers represent the number of requests made on Winkerk Online. The two buttons in Winkerk 7 represent the two different types of requests to deal with.
Where to start – Create new account

1. Log onto Winkerkonline.co.za to register for an account.

2. Click on "Register" and the following screen will open.
3. Click on the dropdown next to “Choose a congregation” and your congregation. Please make sure to choose the right name and denomination of your church.
4. Complete all the necessary fields and click on “Request Account”.
5. From here you can follow the day to day operation.

Day to day operation

1. Member requests
The first member request that need to be dealt with, is your own member request. Only personnel that are members on the Winkerk 7 database, can request changes on the Winkerk Online website. To accomplish this, the Winkerk 7 user needs to “link” themselves on the Winkerk Online website to their own record in Winkerk 7.

⚠️ If a person is not a member of the congregation and needs to act as a Winkerk Online user, that person first needs to be captured as a member in Winkerk 7. The membership status and certificate status can be entered as "Unknown".

When you click on the member request button the following screen will appear.

![User Requests Table]

A list of entries will appear. Click on the appropriate entry and then click on "Show"

The next screen is divided into three sections.
The entry on the left (with the yellow background) is the information as entered by the requesting member on the WinkerkOnline website. At the bottom of the screen is a list of possible matches. The information of the selected member is shown on top in the area with the green background. If no direct match (as in the case above) is found, the user may click on the "Select from all Members" button. This button will open the following screen:

This feature provides the facility to link any member as the requested member to act as a WinkerkOnline user.

Member User

When clicking on the "Accept" button, the following screen will be shown.
In almost all cases it will only be necessary to click on “Accept”. By only clicking on "Accept" the selected member will become a "Member" user. It means that this person (The head of the family) will be able to view and request updates in Winkerk Online for his/her own family.

**Congregation User**
If the selected member also need to view and request updates for all members in the congregation, the Congregation User checkbox needs to be checked.

**Congregation Admin User**
If the selected member also need to assign user rights to congregation users, the Congregation Admin User checkbox also needs to be checked.

**Accepting the members' request**
When accepting the users request Winkerk 7 automatically send an email to the users email address.
The finalization of the process is now in the hands of the user. The user needs to open the email, and the click on the link supplied in the email. When the user clicked on the provided link in the email the user will be taken to the following website.

The user can now log into WinkerkOnline his/her email address as username and his/her own created password.

**Lost Password**

In the case that a user forgot his/her password, it can be recovered by clicking on the "Forgot Password" link on the website. That will open the following screen:

Type the email address that your account is registered with and also confirm the email address. Then click on "Recover Account"

When the user clicks on the "Recover Account" button the user will receive an email in his/her inbox with instructions to recover the password.
The user can now click on the "reset" link in the email. This will open the following screen on the WinkerkerOnline website.

![Create a new password screen](image)

Please type a new password and confirm the new password and click on the "Reset Password" button.

2. Data requests

Procedures in Winkerker Online

When an authorized congregation user logs into Winkerker Online the following screen will be displayed:

![Bothaville - Noord - Members](image)
i. Search Options in WinkerkOnline

Next to the Surname, Nickname, Title, Cellphone, Street address, Neighborhood and Member status fields are filter icons.

![Filter Icon](image)

When the user click on the filter icon a dropdown as above is displayed. Next to "Is Equal To" is also a dropdown. When clicking on this dropdown a list with four options are displayed.

![Dropdown Options](image)

Any of the four options can be used to filter records with.

For instance:

*Is Equal To: Barnard* will display the following members:

![Member List](image)

*Starts With: Ba* will display the following members:
To start all over again with a new selection, click on the "Remove ALL filters" button.

ii. External filters

When you click on "External Filters" the following screen will be displayed. There are three tabs. The tabs are:

⚠️ It is important to remember that you need to click on the button "Remove ALL Filters" before trying to execute any of the external filters.

**Involvement:**
A list of all the involvement items are displayed.

To select members with one or more involvement check the box(es) next to the item and then click on "Filter" Only members that belongs to those activities will be displayed in the list of members.
Groups:

The filter for "Groups" works in the same way as the above filter for involvement.

Birthdays:

There are "Quick Select" buttons for "Today" and "Tomorrow".

A list of birthdays between two dates can be selected by using the Beginning and End Month and Day dropdowns.

After choosing the Start and End days you must on "Filter". A list of members with birthdays between the Start and End days will be displayed.

iii. Remove ALL filters

This button will clear all previously selected filters.

⚠️ It is important to use this button before you want to select any other selection.
iv. View data or request changes in WinkerkOnline.

Locate the member by clicking on the member and then click on the button "Show Details". The following screen will then be displayed.

![Member details](image)

The information for each family member are displayed in different tabs. Each member has their own tab.

If the WinkerkOnline User only have viewing rights, then the "Edit" button will not be visible.

If you need to edit information on this screen, click on the "Edit" button. The background of the screen will change to light yellow.

![Member details](image)

The fields now become active to change the information. Say for instance the names and initial of the member needs to be updated, you can start to change the information on the screen and then click on "Save".
The background of the screen will now change back to the default colour and the requested changes will be highlighted in blue. If you hover your mouse over the blue fields the tooltip will show "Pending Approval"
When clicking on the "Data Request" button in Winkerk 7 the following screen will open.
A list of pending data requests are displayed.