

The African Methodist Episcopal Zion Church

Office of the General Secretary-Auditor

The Reverend J. Elvin Sadler, D.Min., General Secretary-Auditor

The Reverend Tajuan J. Kyles, Executive Assistant to the General Secretary-Auditor

Bishop Mildred B. Hines, Chairperson, Board of Records, Research and Archives

Quick Guide Step by Step Process for Accessing Quarterly Conference Reporting System

Please use the following steps to access the Office 365 and AMEZionGSA.com reporting systems:

Office 365 OneDrive Setup:

1. Open web browser and type in: portal.office.com;
2. Enter your church's User ID;
3. Enter your temporary password;
4. Reenter your temporary password and enter permanent password;
5. Go to Office 365 Apps Page;
6. Click on OneDrive App;
7. Click on upside arrow at "New";
8. Click on "Folder" from drop down menu;
 - a. Window will open in the middle of the page;
9. Type in: Quarterly Conference Workbook, 2017-2018 and press "create";
10. You're finished with Office 365 for now.

AMEZionGSA.com Setup:

1. Open web browser and type in: www.ameziongsa.com;
2. Click on "Reporting Portal" tab;
3. Click on "Get Started" button;
4. When login window opens, type in Church's User ID and password: p@ssw0rd and press login (you may either change the password or leave as is);
5. You will enter your church's dashboard;
6. Click on: "Import Excel File"
7. When the "Excel Upload" window opens, click on the "Need Quarterly Input File?" link;
 - a. The Excel Workbook will begin to load in the bottom left hand corner;
8. Click on the Excel Workbook and it will open Excel;
9. Begin to customize Excel Quarterly Conference workbook for your church;
 - a. Everything in the Workbook begins and ends in the Statistical Report;
 - b. Go to the Statistical Report;
 - c. Type in the General Information for the Church (Church name, Pastor's name, etc.);
 - d. Once you complete the general information, it will show up on every report in the workbook;
 - e. Some reports are tied to other reports;

"Providing Doctrine, Discipline, Information and Research to "The Freedom Church" and the Kingdom"

Department of Records, Research & Archives, The A.M.E. Zion Corporate Headquarters

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- f. When they are, they should be done in this order:
 - i. Financial:
 - 1. Stewards,
 - 2. Trustees & MOK,
 - 3. Pastor
 - ii. Membership:
 - 1. Class Leaders (populates into the Leader of Leaders Report)
 - a. Leader of Leaders needs to have a separate class report if they serve as the Class Leader for the other Class Leaders,
 - 2. Pastor
 - iii. WHOMS:
 - 1. Parent Body,
 - 2. YAMS,
 - 3. Y's,
 - 4. BUDS,
 - 5. Life Members,
 - 6. Supply,
 - iv. Ministries:
 - 1. There are 15 preset forms to customize for Boards, Auxiliaries and Ministries
 - a. Boards, Auxiliaries and Ministries can all be done at the same time because they do not affect one another (Deaconess, Stewardess, Church School, CED, choirs, ushers and others)
 - v. Ministers:
 - 1. All ministers can be done at the same time,
 - a. There are preset forms for Local Preachers and Exhorters,
 - b. A form has to be created for Supernumerary Ministers or Ministers in Specialized Ministry
 - i. This is set up from the Instructions page, using the "Add New Minister Tab" macro button.
 - vi. Additional Forms
 - 1. Should you need additional forms, use the macro buttons on the Instructions page for additional Class Leader, Auxiliary and Ministers.

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10. Sharing the Workbook

- a. Once the Workbook is customized for your church, you may share it one of two ways:
- b. By printing off the workbook and giving it to the leaders to fill out and turn back in to one person to be entered into the Workbook,
 - i. Each form in the workbook is printer friendly,
 1. Click on the requested tab at the bottom of the workbook,
 2. Click on Print Preview and Print in the top left corner of commands,
 3. Print off forms and give to respective officers to fill out,
 4. Once they fill out, turn back into the Workbook Administrator who will enter all information into the Workbook.
- c. Share it digitally with leaders through an email link,
 - i. Once Workbook is customized,
 1. Go to “Review” section of the Excel Workbook,
 - a. Click on “Share Workbook”
 - b. When the window pops up, click on “Allow changes by more than one user at the same time. This will also allow workbook merging.”
 - c. Press OK,
 2. Go to File and Save as Workbook to the OneDrive Folder previously created,
 3. Save the workbook as a regular Excel workbook,
 - a. This will remove all macros,
 4. Go to the OneDrive folder and find the file,
 5. Click to the left of the file and the circle will turn blue with a check in it,
 6. Go to “Copy Link” and click,
 7. Click the blue key that says “Copy” and then close the window,
 8. Go to your email account and paste the link into the message area of the email and email the link to the officers that you will share the link with and press “send”,
 9. The officers will receive an email with the link inside of it,
 10. They will click on the link and Excel Online will open,
 - a. They will be asked to save a copy of the editable workbook,
 - b. Then go to their respective tab, click it on and fill out the information,

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- c. Once the officer has completed their tab, they will close the workbook and it will automatically save the workbook and send the information back to the master Workbook. They are finished!
- d. Once the Workbook has been reviewed by the Pastor and or their designee, it is now ready to uploaded to the amezionsa.com reporting portal.
 - i. Go to: www.amezionsa.com,
 - ii. Click on Reporting Portal,
 - iii. Enter User ID and password. The church specific dashboard will open,
 - iv. Click on Import Excel File. It will take you to the Excel Upload page,
 - v. Type in the name of the Pastor and the click on the “select church” tab,
 - vi. Click “select” and find the place where you saved the Workbook,
 - vii. Click on Workbook and click “open” and the bottom of the page,
 - viii. The Workbook will upload to our system. It will redirect you to your dashboard where you will be able to click on “most current Excel file” and review,
 - ix. It will also go your Presiding Elder, Bishop and the General Secretary’s office. AND YOU’RE FINISHED!!!