

Additional Information

This document contains additional information relating to queries that came up on the training day.

MANAGE USERS

The Manage User section allows you to filter for users who have particular permissions, such as Update Property permissions against a specific church.

For example, if you wanted to find out who had Update Returns permissions for Abbey Meads you would need to follow these steps:

1. Go to Manage Users page
2. Scroll down until you see “Filter by Permission” on the sidebar.
3. Select “Church: Read Property”.
4. Click “Search”.
5. You’ll be shown a list of all users with Read Property permissions in your district or circuit.
6. To filter it to a specific church, you’ll need to click “Select a Church” and find the name of the church you want to see the permissions for, in this case Abbey Meads.
7. The site will then show you only those with Read Property permissions against Abbey Meads.

You can find users with specific circuit or district permissions by selecting the appropriate filters.

The screenshot shows a search interface with the following elements:

- Search by Surname:** A text input field with a yellow background.
- Show:** Three radio button options: All users, Only authorised users, and Only unauthorised users.
- Filter by Permission:** A dropdown menu currently displaying "Church: Read Property".
- SEARCH:** A red button with white text.

The screenshot shows a location filter section with the following elements:

- Filter by Location:** A section header.
- Select a District:** A dropdown menu with a right-pointing arrow.
- Select a Circuit:** A dropdown menu with a right-pointing arrow.
- Church: Abbey Meads:** A dropdown menu with a right-pointing arrow.
- Clear Search:** A button with a minus sign icon.

User Roles

There are three different levels of user on the website and they each use the Property Consent website in a different way. As Superintendent Minister you are authorised as a Circuit User. Below is a summary of the different levels of permission:

1. Managing Trustee user:

- a. With Read Only Managing Trustee Permissions** - User can view projects for the churches they have been given permission to access.
- b. With Read and Update Managing Trustee Permissions** - As 1A above AND can also create new projects, update existing projects, mark projects as abandoned/finished, input information into the project record, confirm church funds and enter the church council authorisation date for projects.

2. Circuit user

- a. With Read Only Circuit Permissions** - User can view projects for all churches in the circuit they have been given permission to access.
- b. With Read and Update Circuit Permissions** - As 2A above AND can also confirm circuit funds, enter circuit comments and enter the circuit meeting authorisation date for projects.

- c. **With Read, Update and Manage Circuit Permissions** - As 2A & 2B above AND can also see all managing trustee users within the circuit, authorise new managing trustee users and add/remove church permissions to managing trustee users.

3. District user

- a. **With Read Only Permissions** - User can view projects for all churches, in all circuits within the district they have been given permission to access.
- b. **With Read and Update Permissions** - As 3A above AND can also confirm district funds, enter district comments and enter the final consent authorisation date for projects
- c. **With Read, Update and Manage Permissions** - As 3A & 3B above AND can also see all managing trustee, circuit and district users within the district and add/remove circuit permissions to circuit users.

AMENDING VS ABANDONING A PROJECT

The “Amend Project” function is only available once a project has been given consent. This will allow trustees to update the project record and is particularly useful if details have changed, such as a significant increase in costs.

The “Abandon Project” function is available at any time and usually used if the project is no longer going ahead.

Sometimes there is a debate between amending a project or abandoning it altogether, particularly when the scope or goal of the project has changed significantly. There is no rule for when one should be done over the other in such situations, but sometimes it is easier to abandon a project and start from scratch if you find that you’ll be re-writing everything on the record. If only one or two items are being changed on the record, then an amendment would be more appropriate.

CONNEXIONAL GRANTS

District Support

Connexional Grants require support from the district chair before they are considered. This is different from final consent and is instead recorded on the grants tab. In most cases, it will be the district property secretary (DPS) entering in the information on behalf of the chair. The DPS will need to ensure that they are logged in as consent giving body to enter this information on to the system.

If final consent has already been given, then the district chair support cannot be added as all the fields will be locked.

Confirmed Funding

Connexional Grants can only be confirmed by the Grants Team once the grant agreement has been received. If the funding has not been confirmed on the Project Summary tab, this will usually be due to the grant agreement not being signed and returned to the grants team.

KEY ACRONYMS

Below are a list of commonly used acronyms within the online suite.

CFB	Central Finance Board
CGC	Connexional Grants Committee
CMT	Circuit Model Trust
CPD	Constitutional Practice and Discipline
CPF	Connexional Priority Fund
DAF	District Advance Fund
LEP	Local Ecumenical Partnership
MAPJ	Methodist Action on Poverty and Justice
MCH	Methodist Church House
MiBF	Mission in Britain Fund
SRC	Strategy and Resources Committee
TMCP	Trustees for Methodist Church Purposes
URC	United Reformed Church

USEFUL LINKS

Online Suite Guidance

<https://www.methodist.org.uk/onlinesuite>

Compress PDFs (Useful for uploading documents to the Documents tab)

<https://www.pdfmerger.com> / <https://pdfcompressor.com>

TMCP Consents Flowchart

<https://www.tmcp.org.uk/kcfinder-uploads/files/consents-flow-chart.pdf>

TMCP Sales Guidance

<https://www.tmcp.org.uk/property/sales>

TMCP Lease Guidance

<https://www.tmcp.org.uk/property/letting-property-and-third-party-use>

TMCP Purchase Guidance

<https://www.tmcp.org.uk/property/purchases>

Funding Types

<https://propertyconsent.methodist.org.uk/guide/59>