

NEW Portal Training

How to Create YOUR NEW ACCOUNT

portal.mywesleyan.org



WHY DO I NEED TO FILL OUT AN ASR AND/OR STAT REPORT?

- The **ANNUAL SERVICE REPORT (ASR)** is a yearly report required by the denomination. Ordained, Licensed, Commissioned and Students are all required to fill out this report annually.
- The **LOCAL CHURCH STATISTICAL REPORT (LCSR OR STAT)** must be filled out by each church in the denomination. Every church, developing or established, must fill out this report.

WHY DO WE NEED A NEW PORTAL?

- The current portal was built by a former employee of THE WESLEYAN CHURCH in Indiana.
- It was cutting edge at the time, but is not adaptable to changing technology or our growing administrative and reporting needs.
- **As we transition we will be using BOTH portal systems.** Please keep your old login information on file along with your new portal login info.

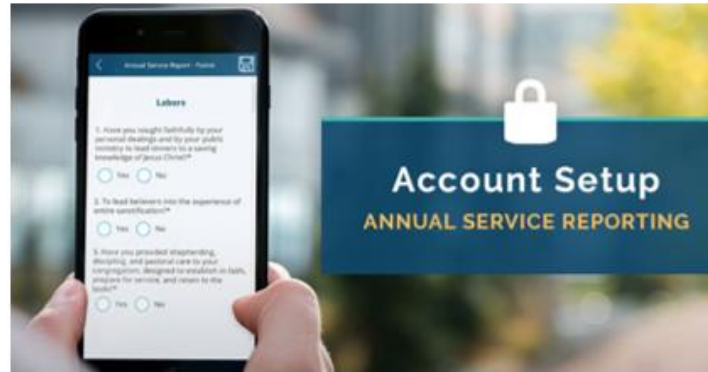


Will you **help us, help others**, set-up their new accounts? Certainly there will be those who have trouble setting up their new account and submitting their reports. Would you determine one person in your church family to help ministers, retired, and students in this new process? We would greatly appreciate it!

SAMPLE
EMAIL

ACCOUNT SETUP EMAIL

- **TWC** sent this email out on April 29th.
(Check your spam folder if you did not get it. It was sent to the email address on the current portal.)
- **FIRST...you** might find it helpful to **PRINT** your email.
- **NEXT...At** the bottom of the email, click **SET UP ACCOUNT**.



Let's get started!

As you may have heard, The Wesleyan Church is [updating our reporting systems](#), including the ability to complete your Annual Service Report (ASR) from a mobile device.

In transitioning to this new system, a new account must be created for your personal profile. You will use this account to complete your 2019 ASR. **This account information is only for the new portal system** — It does not affect the account information used for the old portal. As we continue to develop, add features and transition to the new portal, we will be migrating to a single username and password.

If you have questions, please contact your District Office administrator, Debbie Barwick, via phone (336-886-7729) or email (dbarwick@ncewesleyan.com).

Instructions:

- Click the "Set Up Account" button below.
- Log in using your username and temporary password.
- You will be prompted to change your password and setup password reset information.

Follow the instructions for resetting your password. A PDF guide is available [here](#).

Username: your.name@mywesleyan.org

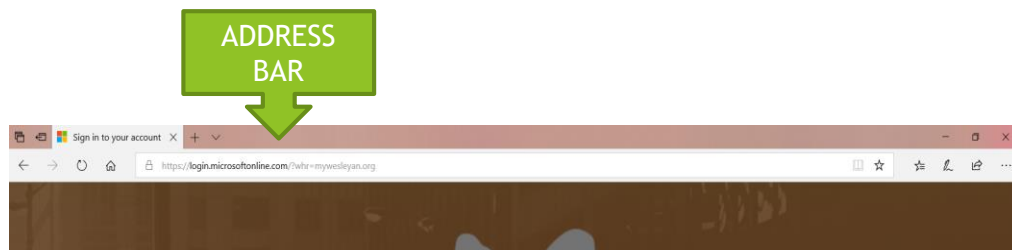
Temporary Password: **Abc123**



SET UP ACCOUNT

It didn't open a sign-in page when I clicked on the SET UP MY ACCOUNT button.

1. If you already have an **OFFICE 365 ACCOUNT**, you will need to log out of your existing account to sign in to your new **WESLEYAN, OFFICE 365 ACCOUNT** (see pages 14 and 15).
2. You may need to use a different browser. (We recommend using Google Chrome or Mozilla Firefox.) Click on the image to the right to download the browser.
3. Open an incognito window (see pages 16 and 17).
4. To access the Portal Home Page, (copy & paste/or type) the following address in to your browser **ADDRESS BAR:**
[PORTAL.MYWESLEYAN.ORG](https://portal.mywesleyan.org)



CHROME



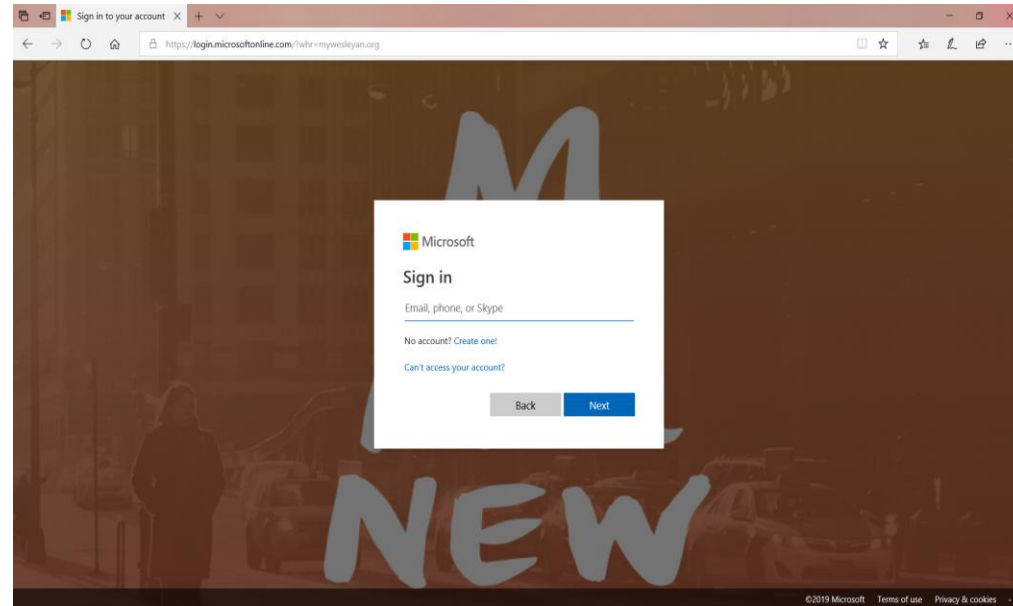
FIREFOX



ACCOUNT SET-UP

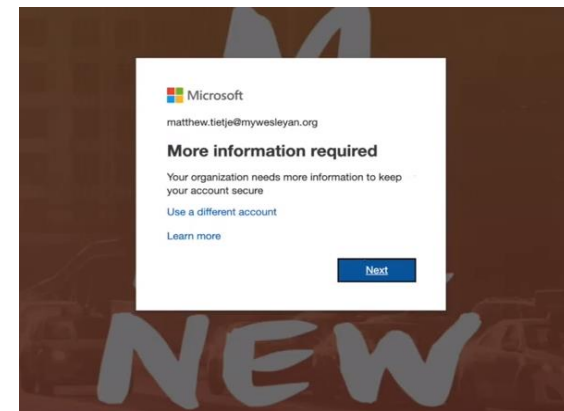
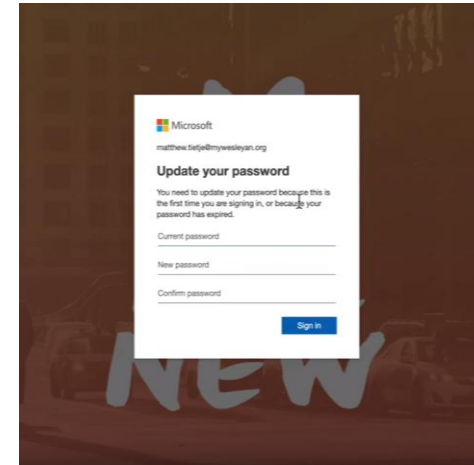
This is what the login page will look like.

1. Enter the username provided in your email - Click **Next**
2. Enter the temporary password provided in your email – Click **Sign In**



ACCOUNT SET-UP

- This will take you to a screen that will ask you to set a **new permanent password**. Enter the “current (temporary) password” in the top line and enter your new, preferred password in the following 2 lines. **Be sure to write your new password down.** – Click **Sign In**
- After changing your password, you will be prompted to provide additional information in case you need to reset your password in the future. – Click **Next**



ACCOUNT SET-UP

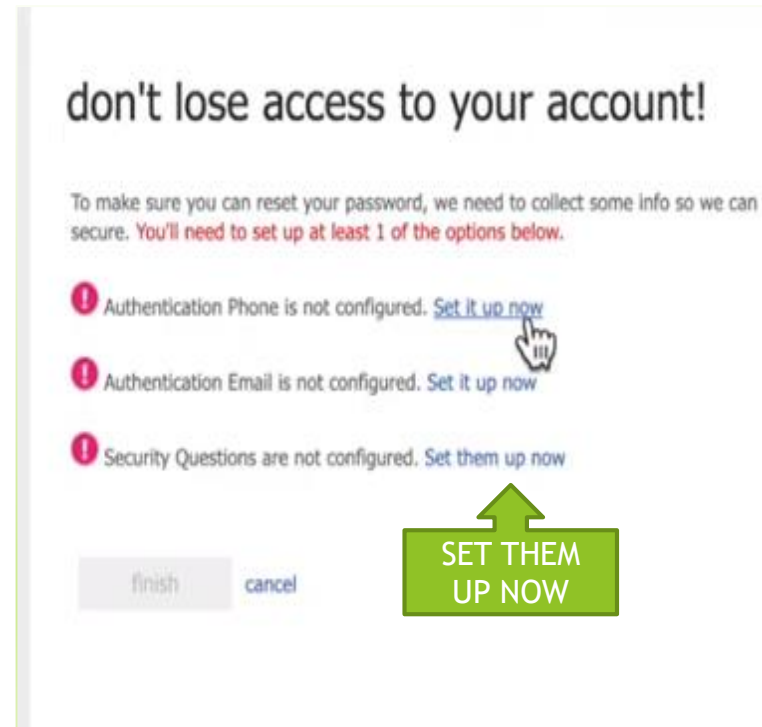
5. DON'T LOSE ACCESS TO YOUR ACCOUNT

Please setup the alternative contact methods by clicking on **Set them up now** at the end of each Authentication Statement. These steps will have you add your cell phone, email address and security questions.

PHONE AUTHENTICATION: Select your country and add your cell number and click **text me** or **call me**. When you receive the text or call, please enter the code and verify your phone.

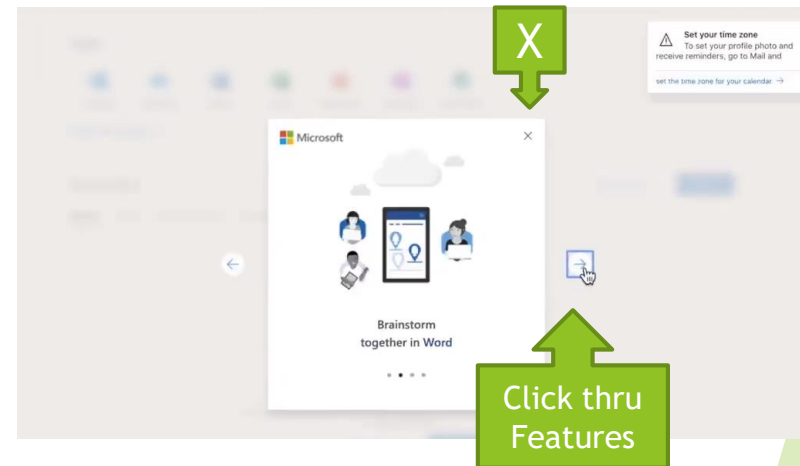
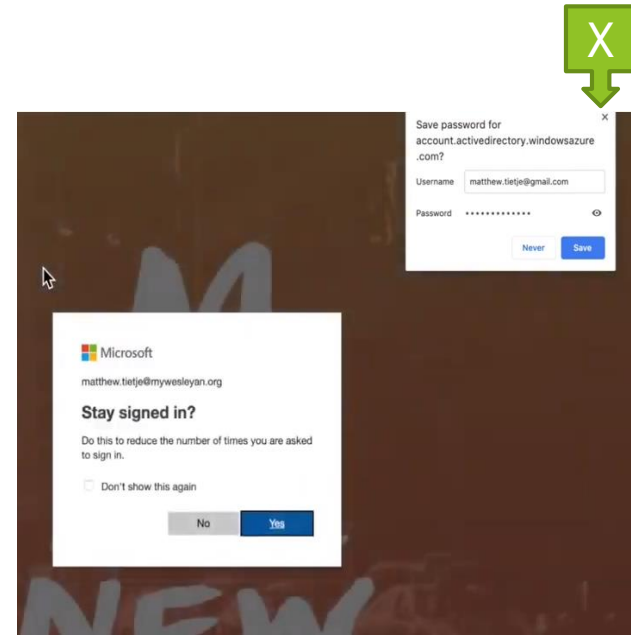
EMAIL AUTHENTICATION: Enter your email address and click on **email me**. When you get the email please follow the instructions to verify your email address.

SECURITY QUESTIONS: Select questions and add your answers. (Please be sure to write down the answers to your security questions.) – Click **finish**



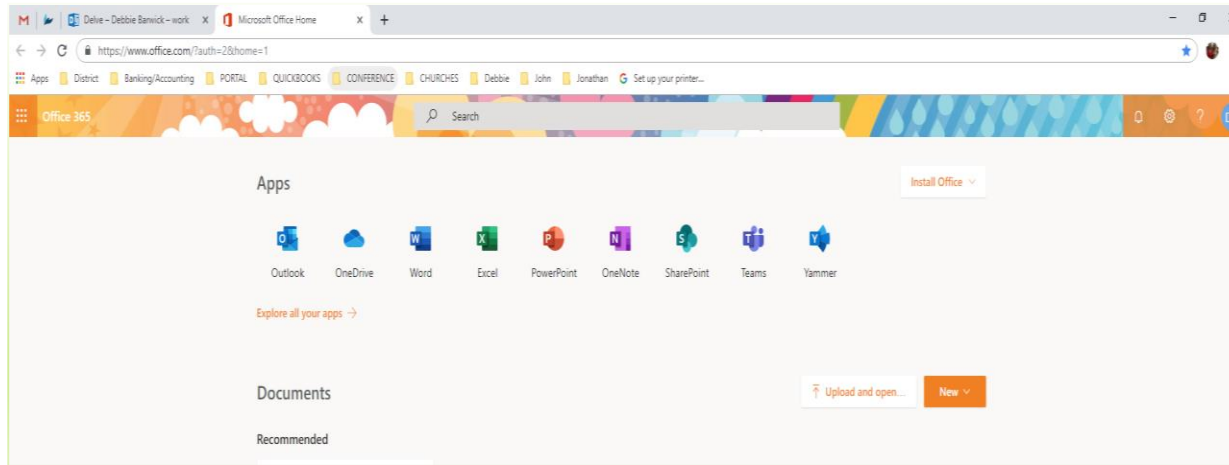
ACCOUNT SET-UP

6. You will be asked if you would like to stay signed in. If you are on a home personal computer, you may choose to do this. It will then remember your login info for you. Choose “save”, “never”, or simply hit the **X** to close the window.
7. On this first login to Microsoft Office you will see the option to view features of the program. You can click through to look at the features or click the **X** to close it out.



ACCOUNT SET-UP

8. You have now completed the setup of your new account.

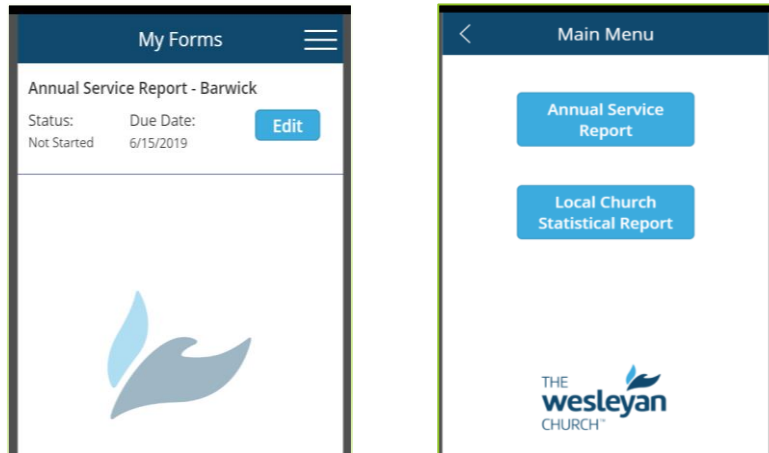


This is what your home page will look like when you are all done!

There will be no need to log back in to your OFFICE 365 PAGE unless you want to change your password or profile information. If you need to log back in, your 365 homepage can be found at [PORTAL.MYWESLEYAN.ORG](https://portal.mywesleyan.org). You **WILL NOT** find your **ASR** or **STAT** report on this homepage in the future. AFTER you have set up your account, the link to access your **ASR** and/or **STAT** is: <https://web.powerapps.com/apps/8d3383f1-3797-40c4-8044-88b8da927240>

ACCESSING AND FILLING OUT REPORTS

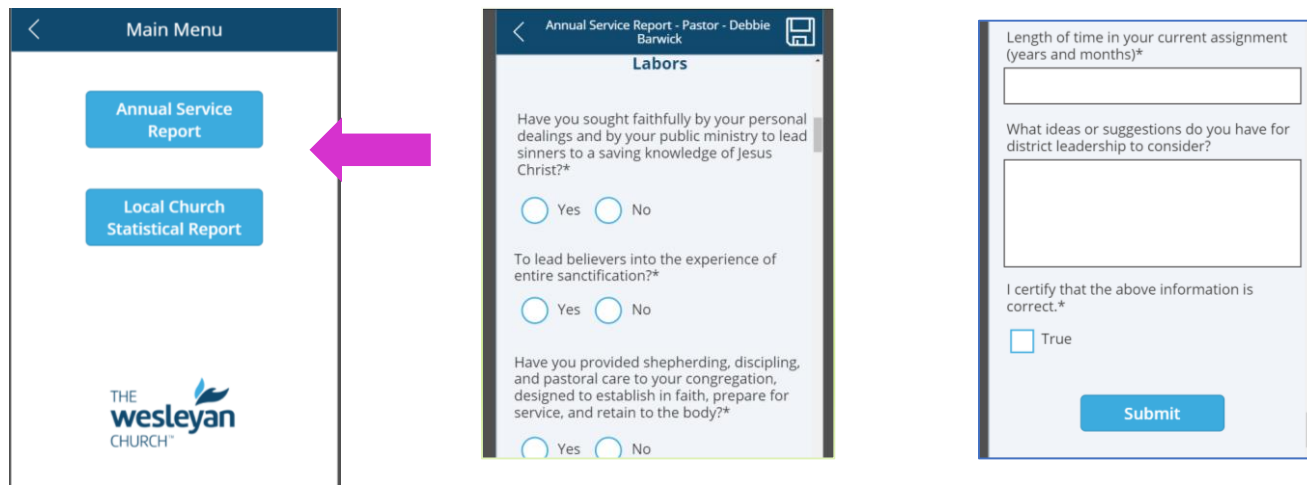
- When your ASR and STAT opens on May 1st and AFTER you have set up your account, **the link to access your forms** is: <https://web.powerapps.com/apps/8d3383f1-3797-40c4-8044-88b8da927240>
- When you click on the link your report will open in the NEW APP. You will use the username and password for your new account to access them.



NOTE: IF IT SAYS YOU DO NOT HAVE PERMISSION TO OPEN THE APP or YOU CLICKED ON THE LINK SEVERAL TIMES AND NOW IT IS GIVING YOU AN ERROR MESSAGE (see page 19)

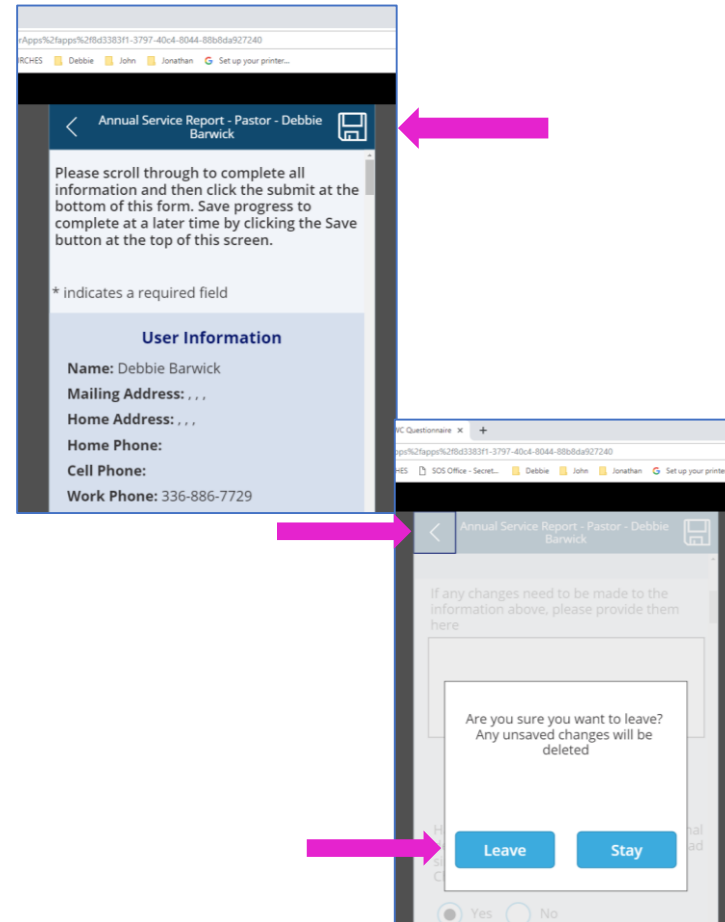
ACCESSING AND FILLING OUT REPORTS

1. If you are a Senior or Solo Pastor, you will see your ASR and your STAT report on your main screen together **IF** they are both open and neither have been submitted yet. To begin your ASR or STAT report simply click on the **EDIT** button.
2. Scroll through your document filling out ALL the questions.



ACCESSING AND FILLING OUT REPORTS

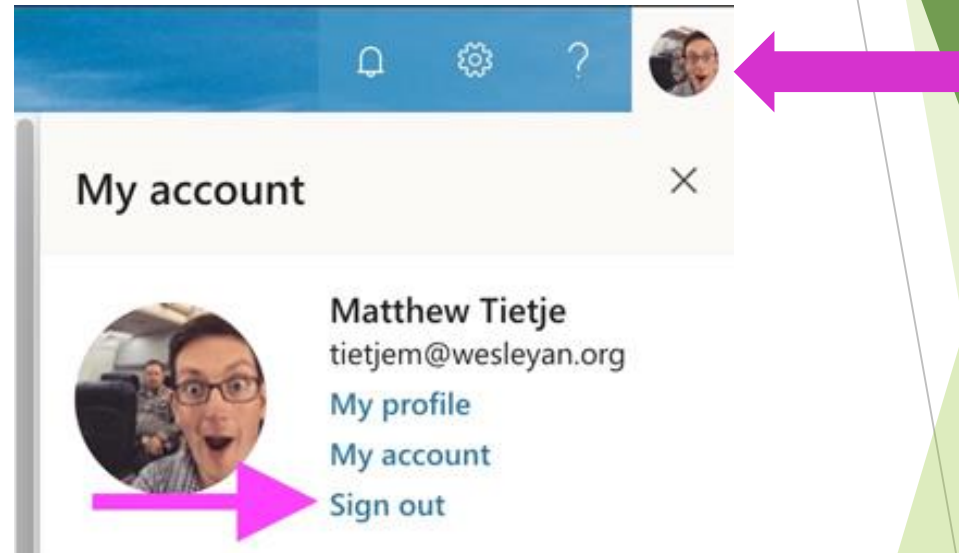
- Once you submit your report you will no longer have access to it. If you want to come back and edit your reports, simply **SAVE**, hit the **back arrow**, and then, **LEAVE** the page.
- When the due date passes the reports will no longer be available for you to file. We have no ability to control this any longer! Please be sure to MARK YOUR CALENDAR and SUBMIT before the due date! **THE DUE DATE FOR BOTH OF YOUR REPORTS IS JUNE 10TH**.



TROUBLESHOOTING: HOW TO LOG OUT OF YOUR PERSONAL OFFICE 365 ACCOUNT

If you have a personal Microsoft Office Account you will need to log out to sign in to your new Portal Account.

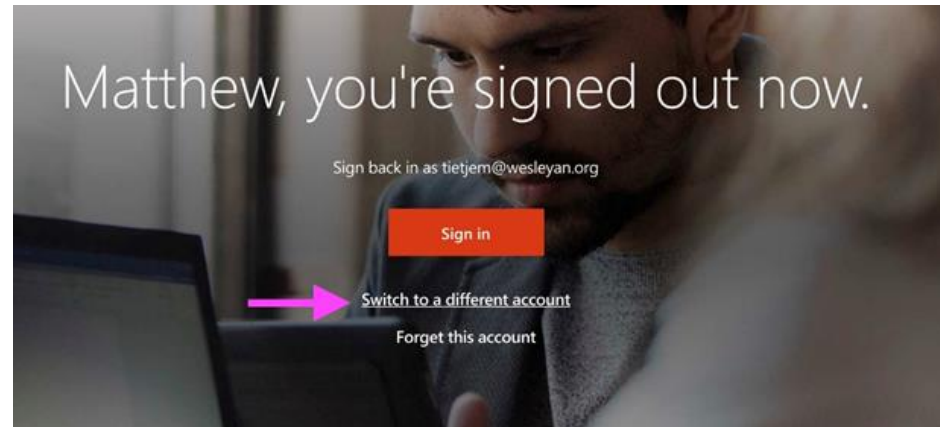
1. Find the circle in the top right corner of the window that has your **picture or initials** in it. When you click on your circle you should see **Sign out**.
2. Click "**Sign Out**".



TROUBLESHOOTING :

HOW TO LOG OUT OF YOUR PERSONAL OFFICE 365 ACCOUNT

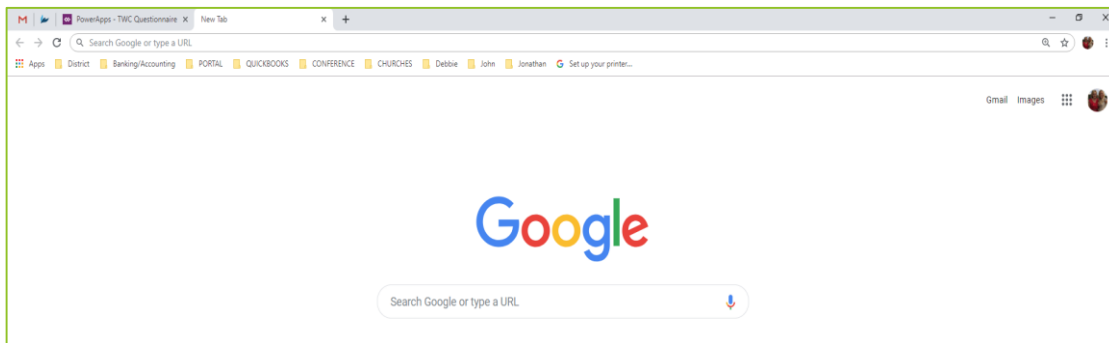
3. Once you have signed out you will see a login screen similar to this. Click on **Switch to a different account**.*
4. Enter your new username and click **Sign in**. Now enter your password and follow the ACCOUNT SET UP steps on pages 6-10.



*You can now switch back and forth between your 2 Office 365 accounts using these instructions.

TROUBLESHOOTING : OPENING AN **INCOGNITO WINDOW**

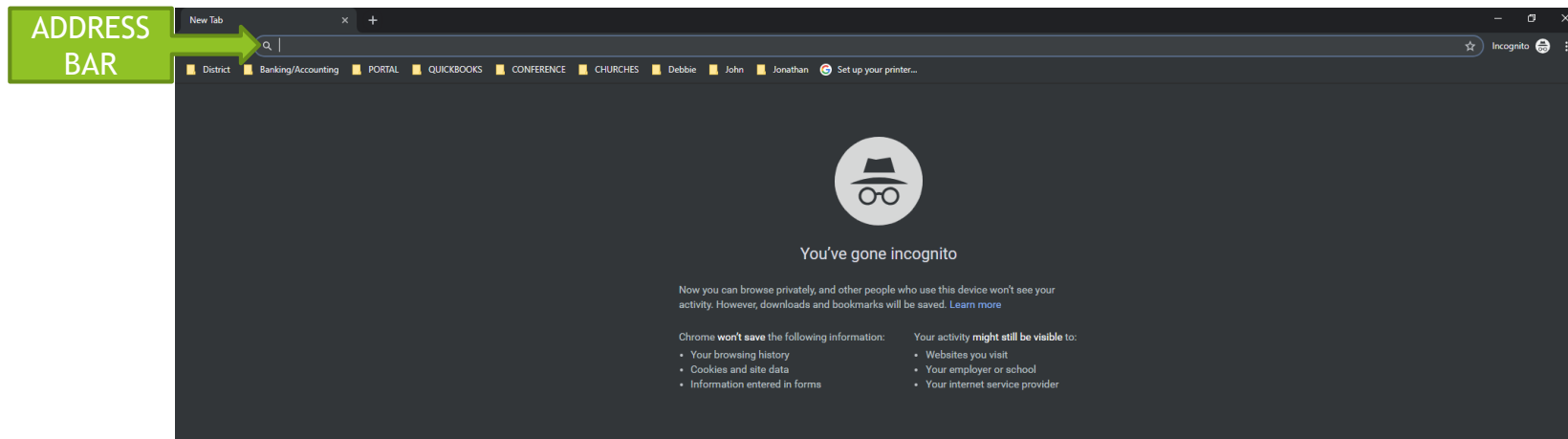
1. Your browser is the window you open to search the internet. Some people use Mozilla Firefox, some Internet Explorer, others Google Chrome, etc.
2. Once you have opened your internet browser, look in the top right corner and you will see 3 vertical dots. Click on the dots and look for “**New Incognito Window**”.



TROUBLESHOOTING :

OPENING AN **INCOGNITO WINDOW**, continued

3. Click on NEW INCOGNITO WINDOW – When opened, the window will be darker than your normal screen.
4. Copy and paste, or type this address in to your address bar. <https://PORTAL.MYWESLEYAN.ORG>
5. Press Enter to bring up the sign in page and then follow the ACCOUNT SET UP steps on pages 6-10.



TROUBLESHOOTING : REPORT WON'T OPEN

My account is set up and I received my report link by email but it says: YOU DO NOT HAVE PERMISSION TO OPEN THE APP or I CLICKED ON THE LINK SEVERAL TIMES AND NOW IT IS GIVING ME AN ERROR MESSAGE

- **YOU DO HAVE PERMISSION and THE LINK WILL STILL WORK if you do one of these three things...**

You will have to...

1. Use your smart phone or another computer or device to open your email and click on the report link
2. Open an Incognito Window (see page 16 and 17) and copy & paste your report link in to the ADDRESS BAR
3. If you had a personal Office 365 Account, the “cookies” saved on your computer will probably keep you from opening your report link. *******Clear all the browsing history/cookies that are stored on your computer.

*****PLEASE NOTE:** Clearing your cookies will cause you to have to log back in to ALL the websites and accounts on your computer with your usernames and passwords. Cookies are the “memory” that is stored on your computer for these frequented sites. Please make sure you have access to ALL the login information for ALL your websites and accounts before proceeding with this option. (Using an incognito window or different device may be your better option.)