



## Sundial-CEF Setup and Quick Start Guide

Welcome to Sundial-CEF, your web-based Calendar, Event, and Facilities management program.

CAA Ministries will notify you by e-mail whenever your custom program has been set up and made live. Your notification will contain two URL's which you will need to access your new program. One URL will open your dash board and system administration panels, and the other will open your church's personalized calendar. You will be provided with a temporary username and password required to open the program's dash board.

**NOTE:** A gray button labeled "Documentation" is located on the opening page where you will find complete details and instruction for the different features and functions included in the program.

Upon initial login to the program, you will need to click the icon that reads "**Configure**". When this page opens you will see a heading that reads "Confirm Program Preferences:" The program preferences are where you can personalize the setup and system function for your desired use.

On the left side of the page you will see five buttons.

- The first two - Step 1 and Step 2 - have been pre set by CAA Ministries and should **not** be changed. At any time you may always just click the "Return" button to return back to the program without making any changes.
- You will need to click on the Step 3 button to setup you personal preferences. Within Step 3 you should review each field and make your preferred changes. Located next to each field you will find a small blue dot containing a question mark. Click on the question mark for help with what needs to be entered and how it will affect the functionality of your program.
- Once you make the needed changes in step 3 you will always need to scroll to the bottom of the page and click the Step 4 button. When this button is clicked it will open for review a list of all of your entered preferences. (**NOTE:** We recommend you print this page and save it for future reference if needed) Next, simply click the button at the bottom of the page that reads "Configure Program".

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The following information has been written to help guide you through the initial setup and use of the Sundial-CEF program within your church's structure. For the program to operate and function correctly within your particular facility, you will first need to survey your facility and compile the needed detail information related to your church. Once you have the information available, you will need to input the data into the program before you will be able to accurately schedule events and manage your church facility. This process will only have to be done once - at the time of your initial setup of the program. The information can always be modified at a later time if necessary.

*There are three major areas you will need to survey or define within your church to get started.*

- 1) List all rooms, buildings, and centers that could possibly be used for a class, meeting, or event. Room numbers and room names will be needed when available.
- 2) Determine the different setup style options (i.e. banquet style, classrooms, theatre style, etc.) which are available for each room, building, or center within your facility. Also, determine the maximum seating capacity for each possible setup style within each facility location, that you have identified above.
- 3) Determine all of the different resources available for use with a meeting or event such as TV's, DVD's, sound systems, video projectors, and tables etc.

#### **Listing Rooms and Determining Setup Styles:**

We recommend you begin by listing all of the available space you have for meetings or events. Once this has been completed you will need to determine the different setup styles that might be available for each particular room or facility at your church. Next we recommend that you survey your overall church's rooms and facilities and determine the different options for setup styles that may be used if needed for each. You must also consider the maximum seating capacity for each particular room based upon different setup styles. For example let's assume we have a room that could be setup for a conference or meeting in one of three options like Banquet Style, Theater Style, or Classroom Style. Perhaps this particular room could only seat 50 people with a room setup of Banquet Style, 75 people with a Class room setup or possibly 100 people when using a Theater Style setup. Once you have completed your survey as explained in the above example for every available room or facility at your church, you will have compiled the needed information to input into our program. With this information now available, you are ready input this data under the administrator's main control panel in our program. Select **Manage Facilities**; then select **Define Setup Options**. Referring to the information gathered from your survey; enter each possible setup style and the maximum seating capacity for each area. (*Note: When doing your survey you may have determined that more than one room had the same possible styles and capacities available. You would only need to enter that style and capacity in the program one time.*)

#### **Entering Rooms and Setup Options:**

Now that you have determined and entered all of the possible setup styles and capacities you will see these available choices when setting up an available rooms or facilities. For example let's say you are setting up a new room that is available at your church. First you would open the administrator's panel of our program and select **Manage Facility**. Next you will need to select **Add a Facility**, and a page will open where you will enter the needed information for a particular room or building available for events or meetings at your church. You will see a list for all of the setup styles and capacities that you have previously entered, and then just select the ones that are available and may be used for this particular room or building when scheduling a meeting or event. Once you have entered the needed information and selected all of the different setup styles available you simply click the button at the bottom of the page that reads **Add Facility** and you're done. You would need to complete this process for each and every room and building available at your church.

When setting up a new Event or Meeting you will be required to first select the room or building you are requesting to use follow by a button that reads **Setup Options**. Next, when you click this button only the available setup styles for this room that you have selected will be displayed. You will then simply select the setup style you require for your specific event or meeting which you are scheduling. Should no particular setup style be required for your meeting or event simply select the “**As Is**” option from the displayed list.

**Entering Equipment or Resources:**

You should have determined and identified all of the available equipment or resources you have available for use when completing your survey as described above. You will need to enter this information for available access when scheduling meetings or events. You will first need to select and click the “**Manage Meetings/Events**” icon. Next click the “**Setup Equipment Available**” button. Once this page opens you will see the fields where you will simply enter each and every item. The equipment you have entered will then be available for use with a meeting or event needing to be scheduled.

**Entering Your Category Options:**

You will need to determine the different categories used when entering a new meeting or event. Categories are usually the different ministries or organizations that meet within your church such as Men’s Ministry, Youth Ministry, and Women’s Ministry etc. To enter your selected categories click the “**Manage Meetings/Events**” icon. Then click the button “Setup Meeting/Event Categories” and enter you preferences.

**That’s it! You should now be ready to start scheduling meetings and events.**