

Records and Information Management System (RIMS) Memorandum

Ministry Information Systems (MIS) a.k.a. Shelby For Mission Centers

Access Request January 23, 2004

Policy: World Church Headquarters, Records and Information Management System (RIMS) is responsible for establishing and implementing database security for all standard software applications provided to all organizational units. We would like to assume everyone who handles information about the congregation is trustworthy. However, we must take measures to restrict unauthorized access to data outside your "Need to Know". In the congregation, the Pastor (PO), Financial Officer (FO), Recorder (REC) or their designee have certain data access requirements. These persons will be known as the (End User). Preserving the confidentiality of the information entrusted to you is the responsibility of each authorized End User, whether it involves using the PC program or the documents supporting the automated database.

The POs, FOs and RECs have different reasons for accessing records in Shelby (MIS). Each authorized End User will only be allowed to the functions within Shelby (MIS) necessary to do their jobs. The appropriate functionality has been more clearly defined by the First Presidency for PO's, Fiscal Services for FO's and World Church Recorder for REC's.

The following procedures will be used when initiating a request for data access. In the future, responsibility for maintaining user access to data may be decentralized to the appropriate jurisdiction level.

1. A request for access to Shelby (MIS) will be submitted on the 'Request for Access' form (see attached).
2. All positions will require approval by a Mission Center officer to approve their authority to access Shelby MIS. The 'Request' form must be signed by the requestor and appropriate authorizing official at the Mission Center. This will acknowledge their acceptance of the responsibilities involved in using the program.
3. All access forms will be mailed to the World Church RIMS office at 1001 W Walnut, Independence, MO 64050 or **FAXed to(816-521-3078)**. Appropriate access codes and accounts will be established once these have been reviewed and validated. RIMS can only proceed with processing the 'Request' form only after all entries are complete and Relationships are entered into the requestors MIS record.
4. Once the request has been received by Information Systems, an account will be created or updated as noted on the request form. If the End User has more than one responsibility, this needs to be indicated on the request application. End Users will be given access to data based on their total responsibilities. A USER NAME and PASSWORD will be issued to the End User by Information Systems. Changes to Shelby (MIS) access may not require an additional Citrix account be created. Persons requesting Shelby (MIS) Access to conduct training only will not have access to a live database. Training can be performed by using one of the TRAIN1-5 USER NAME in the Shelby Training database. Passwords for the training databases are the same as the user names.
5. The End User will be notified of their USER NAME and PASSWORDs. Included will be a package containing MIS software, software installation instructions and other End User documentation. Users requesting only changes to their responsibilities will be notified by Email once the account has been updated. Any account not used for 6 months will be deactivated. A warning notice will be given at the 5th month of inactivity, allowing 30 days grace for the user to reactivate their account by logging in and using MIS. Persons, who were once a previously authorized Shelby (MIS) user and have been deactivated, must reapply through the appropriate approval/authorizing authorities. To retain active status, each user must log into Shelby at least once every 3-4 months even though there may not be a need to change data.

Shelby Responsibility/Access Descriptions

Recorder – Inquiry & Update to:

Church Tab - Membership, Friends, Miscellaneous, Registration, GlobaFile

Financial Officer – Inquiry & Update to:

Church Tab – Contributions, Membership, Friends, Miscellaneous, GlobaFile (to add new contributors and assign envelope numbers only)

Financial Tab – All Modules

Presiding Officer – Inquiry to:

Church Tab – Membership, Friends, Miscellaneous, Registration, GlobaFile

Financial Tab – General Ledger Reports

Accounting Clerk – Inquiry and Update to:

Financial Tab – All Modules

Contributions Data Entry – Inquiry & Update to:

Church Tab – Contributions, Membership, Friends, Miscellaneous, GlobaFile (to add new contributors and assign envelope numbers only)

Youth Worker – Inquiry to:

Church Tab – Membership, Registration, GlobaFile

Inquiry Only – Inquiry to:

Church Tab – Membership, Registration, GlobaFile

Full Rights – Inquiry and Update to: ALL MODULES AND SYSTEM FUNCTIONS