



SETTING UP AND RUNNING BACKGROUND CHECKS IN ARENA USING PROTECT MY MINISTRY (PMM)

SHELBY SYSTEMS, INC.

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Prepared by:

Arena Development and QA

Version 1.1

PROPRIETARY
and
CONFIDENTIAL

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Document Scope and Purpose:

The scope and purpose of this document is to facilitate Protect My Ministry (PMM) support staff in their efforts to transition Shelby/Arena customers from PMM’s legacy processing platform to their new background check processing platform. This document is intended for internal use of PMM staff and is not approved for general distribution to any outside entities.

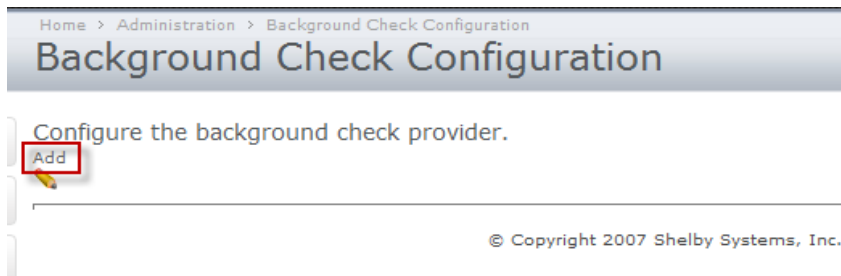
1. BACKGROUND CHECKS CONFIGURATION INSTRUCTIONS

The following are the step by step instructions for entering PMM information and for configuring backgrounds checks to their platform.

STEP 1 – ENTER PMM INFORMATION IN BACKGROUND CHECK CONFIGURATION

The process for this step includes the following tasks:

1. Under Administration, click Background Check Configuration (should be using the module Protection/Backgroundcheckproviderlist.ascx)
2. Click Add to create a new background check provider:



3. Enter the information for your provider and click update:

Home > Administration > Background Check Configuration

PMM

Configure the background check provider.

Name

Assembly Name

Class Name

Username

Password

4. Your providers will now appear in the Background Check Provider List:

Home > Administration > Background Check Configuration

Background Check Configuration

Edit Settings..

Configure the background check provider.

Name	Username	Assembly Name	Class Name
PMM	Arena	Arena.Framework	Arena.Protection.PMMProvider
FRS	jc7ht3fshg	Arena.Framework	Arena.Protection.FRSProvider

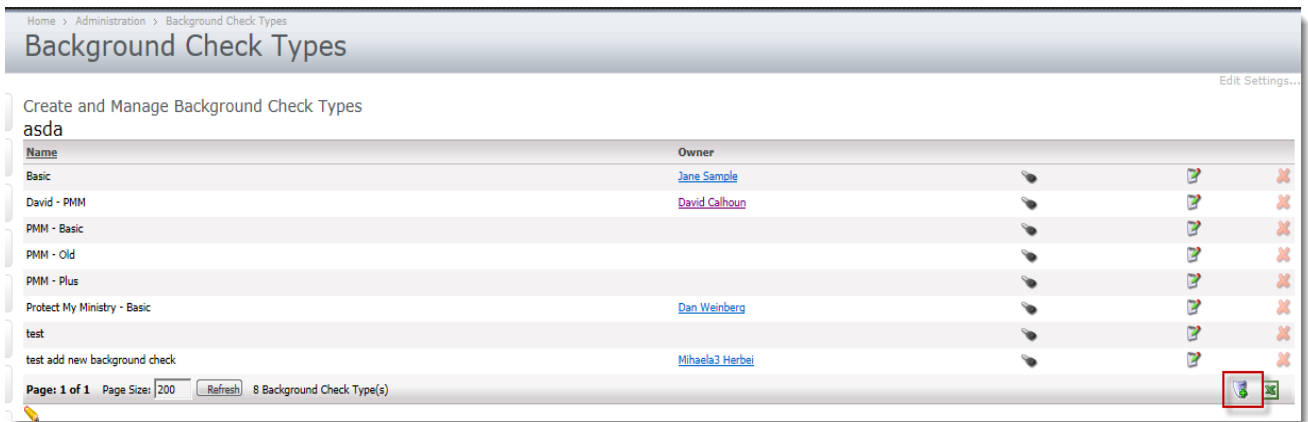
Page: 1 of 1 Page Size: 200 Refresh 2 Background Check Provider(s)

STEP 2 – CREATE BACKGROUND CHECK TYPES

The process for this step includes the following tasks:

1. Create Background Check Types that use the Background Check Providers. Under Administration, click Background Check Types and click the New icon to create a new type.

Note: The New icon appears if there is already data in the Background Check Types data grid. If there is no data in the grid, a link that says New will be there in its place.



2. Enter the information for your type, and choose the Provider from the drop down menu (all the background check providers you have added should appear for selection), click Save when finished.

Note: Please contact PMM to find out the name of the background check type, the Package Service Code, and whether it is an Auto Populate type.

Background Check Details

Name Basic

Provider PMM

Owner [Change...](#)

Active

Auto Populate

Package Service Code BASIC

Notifications

- Owner on Request
- Approver on Results Received
- Requestor on Approve/Deny
- Requestor on Complete

Screenings

- Credit Screening
- National Criminal Database Search
- Court Search Screening
- National Sex Offender Registry
- MVR Driving History
- SSN Verification & Address History

3. All your types should be visible in the Background Check Types data grid.

Home > Administration > Background Check Types

Background Check Types

Create and Manage Background Check Types Edit Settings...

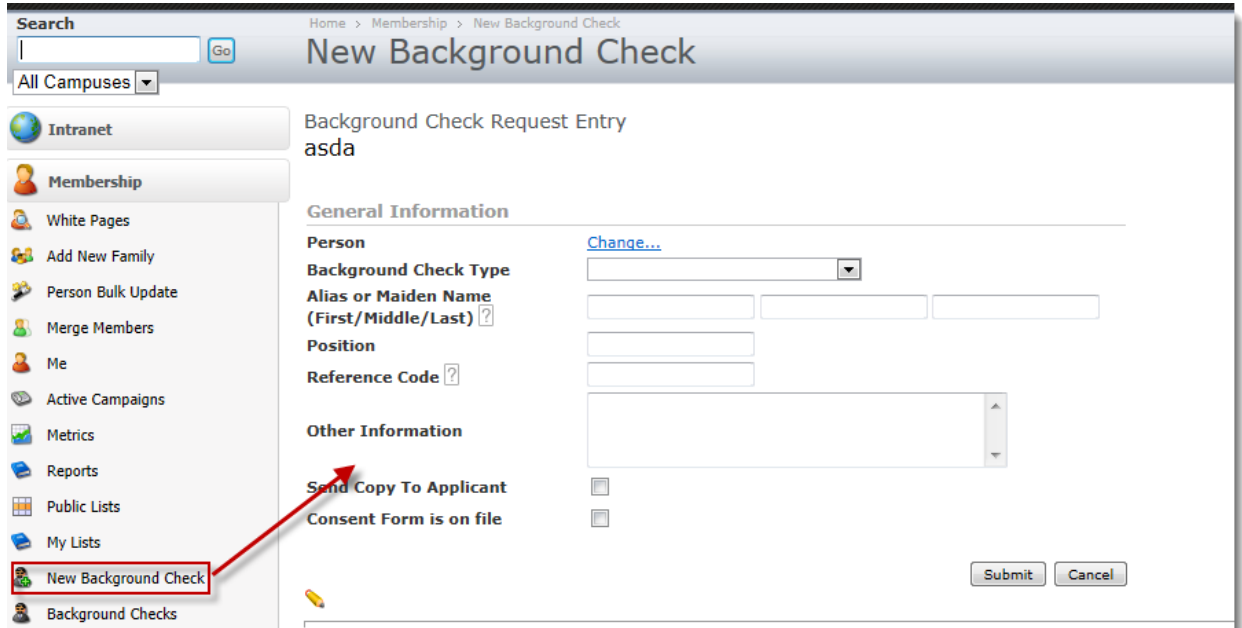
Name	Owner			
Basic	Jane Sample			
David - PMM	David Calhoun			
PMM - Basic				
PMM - Old				
PMM - Plus				
Protect My Ministry - Basic	Dan Weinberg			
test				
test add new background check	Mihaela3 Herbei			

Page: 1 of 1 Page Size: 200 8 Background Check Type(s)

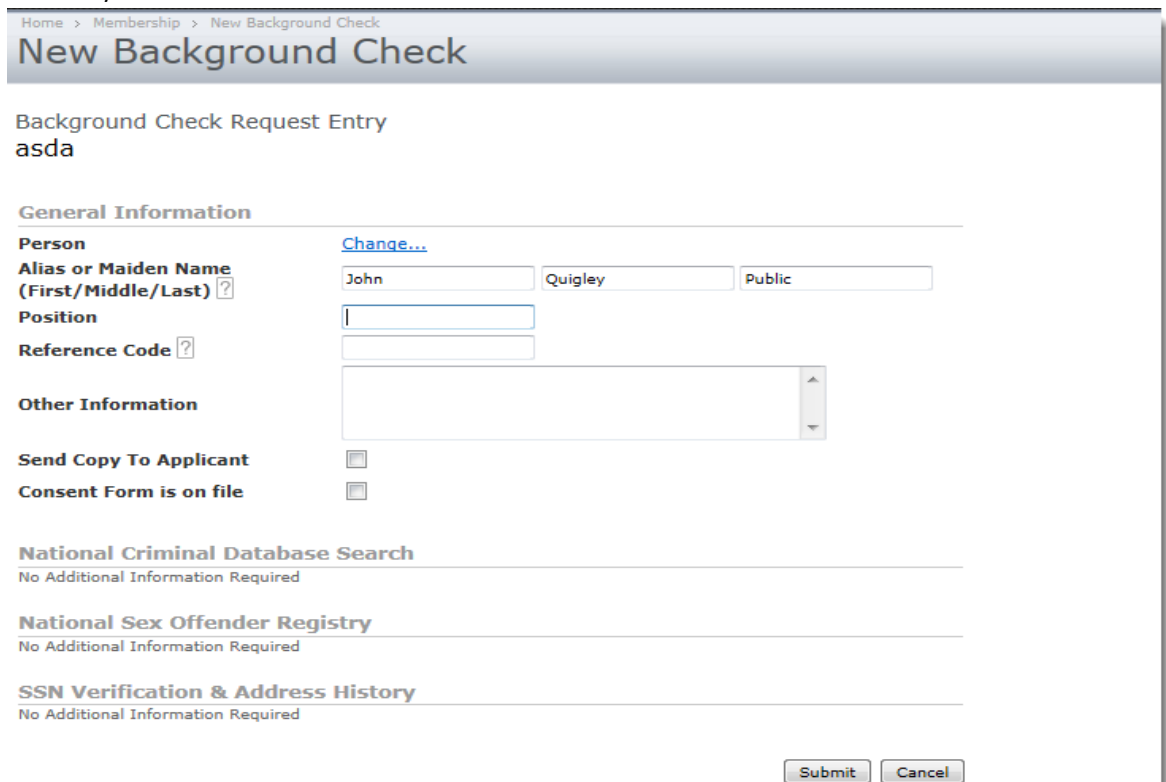
STEP 3 – REQUEST BACKGROUND CHECKS

The process for this step includes the following tasks:

1. The background checks can now be requested. To begin, under Membership select New Background Check.



2. Enter the person, the Background Check Type from the drop down menu, and any other information necessary and click Submit.



3. All of your requested/pending/complete background checks will appear in the Background Checks menu item under Membership.

Requested On	Requested By	Status	Results
Dan Weinberg [R]	Dan Weinberg [R]	Processing	
Daniel Doe	Mr Stewie Administrator [R]	Processing	
some Doe	Jane Sample	Rejected	
David Calhoun [R]	David Calhoun [R]	Completed	COMPLETE - Clear
david calhoun	David Calhoun [R]	Received	COMPLETE - Clear

A note on security: You must have approval rights to approve a requested background check. If you do not, the background check will appear as “requested” until someone with approval rights approves it, changing it to “pending”. To set the approval rights, click Background Check Types under Administration, and click the security key icon for the background check provider. This will launch the security window where rights can be adjusted.

Background Check Types

Create and Manage Background Check Types

asda

Name

Basic

David - PMM

PMM - Basic

PMM - Old

PMM - Plus

Protect My Ministry - Basic

test

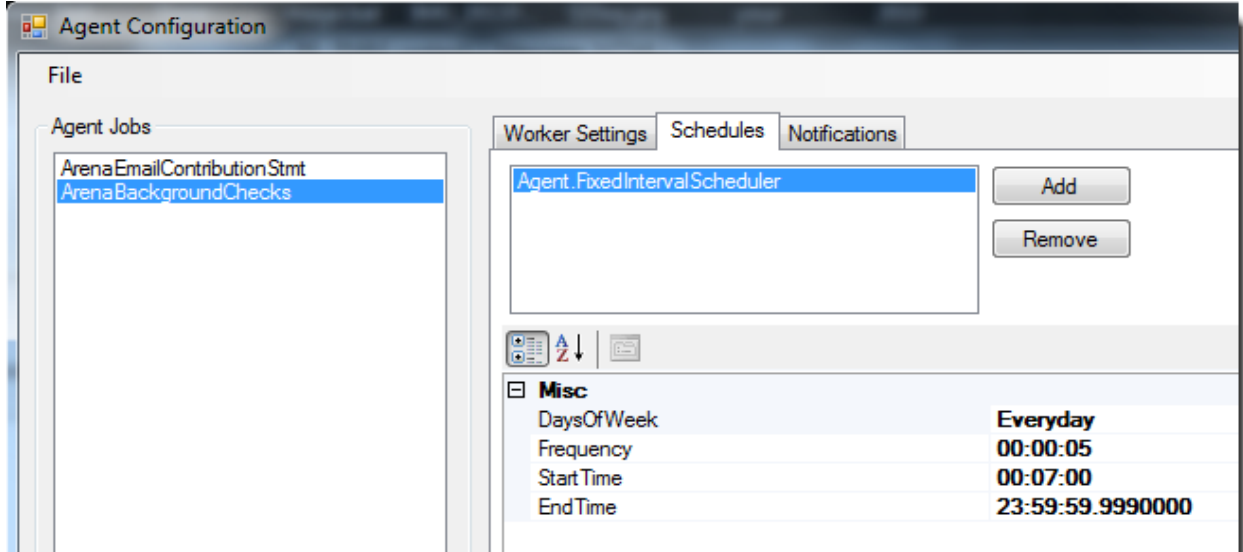
test add new background check

Page: 1 of 1 Page Size: 200 Refresh 8 Background Check Typ

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STEP 4 – RUN THE ARENABACKGROUNDCHECKS AGENT AT A SCHEDULED INTERVAL

In order for background checks to process, the ArenaBackgroundChecks agent must be running at a scheduled interval (user defined). This can be set up by launching agentconfiguration.exe from your Arena Automation Agents folder in your Arena program directory.



2. FREQUENTLY ASKED QUESTIONS

1. How to run background checks?

In order for background checks to process, the ArenaBackgroundChecks agent must be running at a scheduled interval (user defined). For more details, please review Step 4 of the Background Checks Configurations Instructions on page 8.

2. What are the version requirements in Arena?

2011.1.500 (Patch for 2011.1.100)

2011.2.100 (Latest Version)

3. Will current v.5 customers be affected by the migration?

No. This cutover only impacts Arena customers. Our v.5 products are not in the scope of this migration.

4. What is the deadline for the cutover?

March 1, 2012. It is possible to extend it for up to 30 days.

5. What happens to my existing back ground checks?

Pending background requests need to be completed in existing PMM system before transitioning to the new one.

6. How will churches be notified about the changes in PMM's processing platform?

PMM will contact each Arena client individual and walk them through the process. They will also make sure that packages are set up correctly with accurate usernames, etc.

3. VERSION/PATCH REQUIREMENTS

Current Version Requirements in Arena:

2011.1.500 (Patch for 2011.1.100)

2011.2.100 (Latest Version)

To download updates, please go to Arena Community:

<http://community.arenachms.com/files/default.aspx>

For update/upgrade support, please contact Arena Support.

Phone: 888-772-7362, Option 2 (7am - 6pm CST)

Email: support@arenachms.com

4. SHELBY CONTACT INFORMATION

If you have any questions, feedback or suggestions, please contact:

Janea Hancox

3rd Party Coordinator

Shelby Systems, Inc.

7345 Goodlett Farms Pkwy, Cordova, TN 38016

www.shelbysystems.com

Phone: 800-877-0222 ext. 1004

Email: janea.hancox@shelbyinc.com