Rochester Diocese Contact Management System - User Guide

Document Management

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An Introduction to the Rochester Diocesan Contact Management System:

What, Why, Where, Who, How, When…..?

What is the Contact Management System?

The Contact Management System (CMS, for short – it saves a lot of typing) is the replacement for the current ParishInfo website and the paper Diocesan Directory. It is part of a National Church Database of which a little over half the Dioceses in the Church of England have either joined or are committed to joining. It links into the Church of England Portal, which is a single point of access for participating websites from various parts of the C of E.

So what is the Portal, then?

The purpose of the Portal is to enable those who are registered on one C of E website to be able to request access to others, and after linking in their accounts, to then use the same email address and password to access all of them. Changes to an email address or password are also effective over all sites that connect via the Portal, meaning only one change is required.

Why make the change?

The Diocese has not created a paper directory for a number of years now. Whilst it has proved a useful resource, it was generally out of date by the time it had gone to press. The Diocesan Office staff have had an internal contact database provided the data for the ParishInfo.org website and for the production of the paper directory. As the developers of ParishInfo and the database are no longer actively developing that offering, we needed to obtain a new contact database. The National Church's CMS project enabled us to do this collaboratively with other dioceses and at much less cost than doing it entirely by ourselves.

Who does this affect?

Anyone who appears in the Diocesan Directory – so that's Clergy, Lay Ministers, Lay Workers, Church Wardens, PCC Secretaries, Treasurers…. If you're currently in a role that is listed in the directory, then you will able to apply for it.

What information is held?

That depends on your role. For most parish roles the information held will only be contact details such as address, phone number and email address – plus the dates of that role (and any which you may previously have held). For those in (or training for) a formal ministry role, whether lay or ordained, and who are licensed, authorised or commissioned by the Bishop or hold his Permission to Officiate, we will hold more detailed information. This will include things such as the expiry dates of safeguarding training, DBS, and so on. Clergy and Lay Stipendiary roles will also have information held which is in line with that held for an employee.

Who can see my information?

The information is entirely on a need to know basis and permission levels are set very tightly. Most users of the CMS will be able to see contact and role information only and no more than that. Diocesan Office staff will be able to see slightly more contact information which will be necessary for us to administer our duties to you in carrying out your role. Bishops and those who manage ministry will see all the information held.

The database administrators will understandably have full access to the database in order to manage the records and support it on a day-to-day basis. The administrators are Iain Ambler, ICT Manager; Suzanne Rogers, Pastoral and Synodical Administrator; and the system support and development team at Worthers who have written and host the system.

You have the ability to restrict who may see your details, and instructions on how to do this are within this document. You are advised that if you do restrict your details too tightly, people will be unable to find you!

Where, how and when can I access the CMS and Portal?

The Portal and CMS is internet based and can be accessed from any web browser on a PC/laptop or a mobile device. For those accessing the database on a smartphone or small tablet, there is a mobile version of the web interface designed for those devices which should automatically be selected when you navigate to the web page. The site is available now for use, and we will be requesting that the Parish Info site for Rochester Diocese is ceased shortly as no updates are now being published to the old database.

You're welcome to register for the Portal and to apply for access to the new database as soon as you wish. Access requests are always approved by humans in the Diocesan Office so you will need to allow us time to do this for you within office hours. Please also bear in mind that we are likely to have many applications for access in a relatively short time as we roll out access to parish and deanery post holders and will be setting aside some time slots to process them. Please do be patient as we set the system into motion!

How do I sign up then?

Please find the instructions on how to sign up and then use the CMS on the following pages. We have tried to make them as straightforward and jargon-free as possible.

What if I need help?

If you are having trouble signing up, then we are more than happy to help. We would ask that you send us an email rather than phoning us – whilst we generally work Monday to Friday, 9am-5pm, there are times when we are in meetings, off site, or actively dealing with issues.

Please email CMSSupport@rochester.anglican.org and Iain Ambler, ICT Manager will endeavour to get back to you as soon as he can.

What about changes to parish roles?

For any changes to roles within your parish or deanery such as PCC Secretary, Treasurer, Deanery Lay Chairs, Synod Representatives etc, please continue to report these in the usual way following an APCM or email CMSChanges@rochester.anglican.org and Suzanne Rogers will process these as soon as she can.

Clergy and Lay Ministry changes/appointments are also dealt with by Suzanne as and when people are appointed to their new roles.
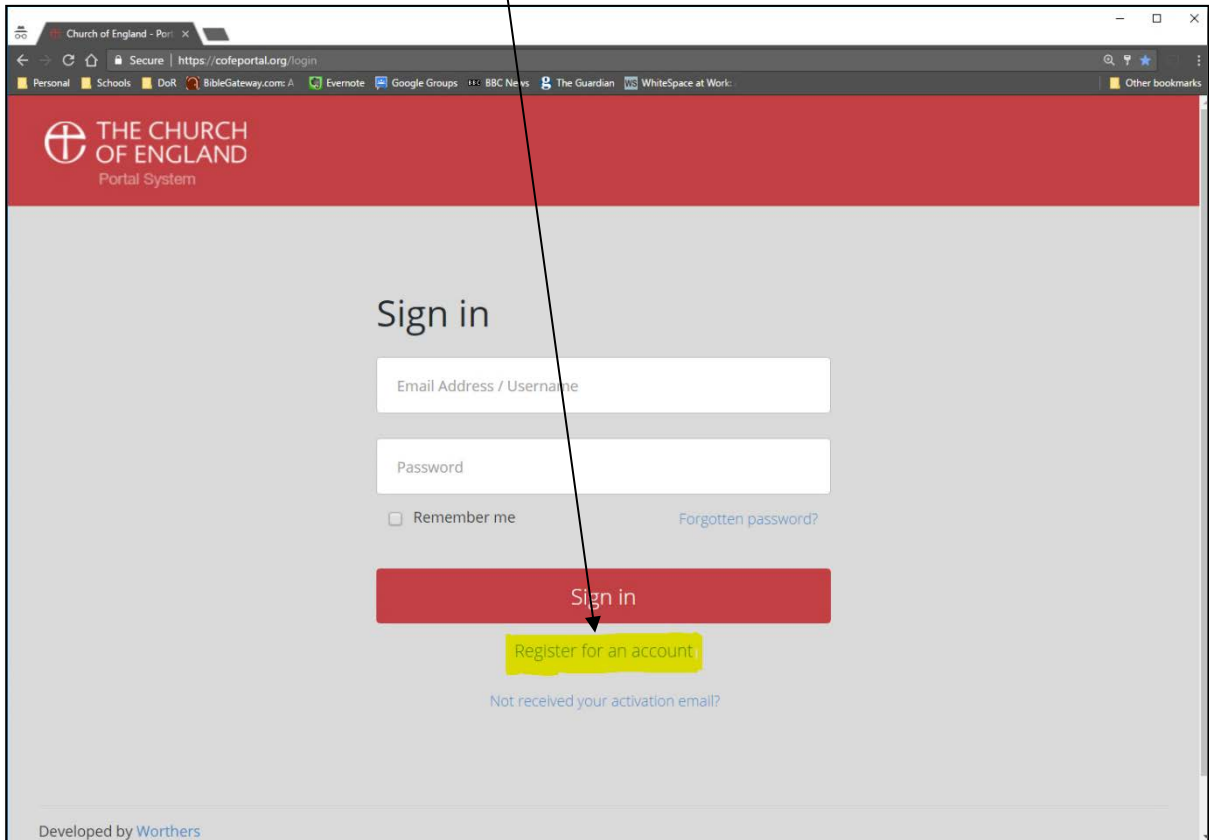
What if I need further copies of this document?

This document will be available to download from the diocesan website (www.rochester.anglican.org) on the *Forms, Publications and Guidance* page.

Signing Up to the Portal and CMS

Follow the instructions below to set up your access.

- Go to this website: https://cofeportal.org/login - we recommend you bookmark this address as this is where you will access the database from now on.

- Click on **Register for an Account**

- Type in your full details. Please make sure that you use the same email address that will already be registered within the database (if you are already in the current database). Choose a password that you will remember, and which conforms to the password rules of **minimum length of 8 characters** containing at least **one upper case letter** and **one number**.

- After submitting this information, the system will send you an email. Open the email and click on the link within it to validate your account.

- This will take you back to the sign in page where you should then sign in with your email address and the password you have just set.

- Click on the tile which says **Contact Management System**.

- Click on **Request CMS access** on the left-hand side of the page.

- Choose **Rochester Diocese**.

- Choose your parish (you can leave this blank if your role is not within a parish).

- Enter the postcode. This postcode links your new account with a record in the CMS database, so you should enter the postcode that your record would use which will likely be your home postcode.

The system will now send a request to the administrators of the database asking if access should be granted. This requires a real person to check everything is OK and to apply the relevant permissions to the account: please allow time for them to complete this. As soon as the verification is done, you will be notified and access to the database will be immediate.

Once access is gained to the database, the first page will be the personal contact record which you are asked to view and verify. Clicking on **View my full contact record** at the top of the right-hand side of the screen allows the details to be edited.

It is possible to be very specific about what data is shared within the Diocese and on the public and National Directory. Click the drop-down boxes to specify how you want to share your data. (See privacy settings under Contact Search later in this guide.)

Users are asked to strongly consider which details they make private: this could result in people being unable to find you!

Using the Portal

Overview

The CMS is very simple to use, and is based around three main sets of information: Contacts, Places (including Buildings) and Roles.

The combination of a Contact in a Place with a Role is called a Post.

Dashboard

This is the first page you land on after logging into the CMS and provides a summary of information tailored to you. The following sections describe the various dashboard areas.

My contact record	The dashboard is the first page you access after logging into the CMS. This will display a summary of your contact details with a link to view your full contact record. There is also the option to edit your contact record at any time using the top right link next to the 'Log out' link.
My saved searches	This will display your most recent saved searches by name. You can click on any of these to be taken to the appropriate search with the saved criteria automatically loaded for you. You can then amend or just click search to return the last results. There is is also the option to view all your saved searches if it doesn't appear in the most recent list.
Diocese saved searches	This section shows the most recent Diocesan Saved Searches. These are created by Database Administrators who have the correct permissions. Again there is a link to view the full list.
My recent searches	This lists your 10 most recent searches even if they haven't been saved. This is useful to quickly reference a recent search again.

Navigation Menu

The main navigation menu is found on the left-hand side when using a normal desktop. You will notice there is an option to minimise this to provide more space for the main content area. This automatically minimises and adjusts when accessed via tablets and mobile phones. Note that from a mobile phone browser you will find the main navigation menu by clicking the top right **menu** icon.

The navigation menu will display various options depending on your approved level of access. If you have not been approved to access a diocesan set of contacts, you will only have access to the National Directory. If you have been approved, then you will have access to Contact, Post, and Place searches.

National Directory

By default, all active users will have access to the National Directory. This only contains public data for dioceses that are currently using the CMS. There are three free-text options for searching and these can be used individually or combined to further filter results. The options include searching for contact name, place (e.g. town or city), or role (e.g. warden).

Results will display surname, first name, title, diocese and current posts (role and place). Depending on privacy controls, email and phone number may also be shown.

Diocesan Searches

Once your access to the CMS Database has been approved, you will have access to the main search sections that include:

- Contact search
- Post search
- Place search

These searches provide powerful but different approaches to finding the data you require. In summary, '**Contact search**' will help you find contacts and their related data in a similar way to the National Directory. '**Post search**' enables you to find contacts that fill certain roles and relate to the places that those roles apply to. '**Place search**' provides the ability to find place and associated summary building information. Some of the same data can be found using a combination of these different approaches and it is best to experiment to find out which search helps you to best find the data you require.

Contacts

Contact Search

This search will help you to find specific contact details. There are a few options for searching that can be combined to further filter your results. There are also various advanced options to provide even further ways of locating the information you require.

Contact	This is a free-text field and will search for matches within most of the core contact fields including names and addresses. You can restrict to just search within the name fields if you would like. This will search within surname, forenames and informal/known as fields. To restrict the search in this way, put a tick in the box below the free-text field.
	There is also the option to refine searches by using the boolean AND operator. For example, if you search for 'john smith' it will return matches for both john or smith but if you type 'john AND smith' it will return matches where a contact matches both 'john' and 'smith'.
	Searches are case insensitive so you don't need to worry about using upper case for names.
Place	You have a few options with this search field. You can either enter a free text string, e.g. a name of a place or church. As soon as you have entered 3 characters you will start seeing a list of matches and this will further refine as you enter more characters. Click on a place to add it to your search. You also have the option to add additional places that you would like to include in the search.
	Alternatively if you click the icon beside the search field you will launch the place browser. This provides a method to drill down the place hierarchy to find places. You can select a place at any level and contacts below this level will be included within your search results. This provides a very powerful method for finding contacts across the Diocese.
Role	This option enables you to search for contacts that are assigned to specific roles. In the same way as for places, as soon as you have entered 3 characters it will return matches from the list of roles. The more you type the further the list will be refined. Once you have found the role you wish to include you can click to add it to the search field. Again you can add multiple roles so this allows you to create powerful searches covering several roles at once.
Advanced options	There are several advanced options enabling you to search for contacts within past or future posts as well as include any deceased contacts. You can also search for contacts within set radii from a post code. This does rely on the contact having a post code.
	Tip: If you require further search refinement and you have the required permission, you can download an excel copy of the search results and apply additional filters within Excel

Search results	Once you have run your search and there are matching contacts you will see a list of contacts showing summary information. This includes their surname, 'known as' first name, title, email, phone numbers and current posts. Some data (e.g. email and phone numbers) may not be shown depending on the contact's privacy settings and your permissions.
Privacy settings	There are 3 levels of privacy setting:
	Public - This will show in the National Directory and is depicted by a green open padlock icon
	Diocese - This will only be shown to other approved diocesan users and is depicted by a yellow half closed padlock icon
	Private - This will only be shown to Database Administrators or those with high levels of permissions and is depicted by a red closed padlock icon.
Actions	Depending on your permissions you will see several Action icons above the search results on the right.
	Save Search - This provides the option to save a search and makes it available to reload the search criteria in the future. It is useful to save this with a meaningful name to help you locate it again in the future.
	Download - This provides various methods (Excel, CSV and PDF) to download contact data for the current search results.
	Mailing - Depending on permissions, you may have the option to email the contacts for the current search results. This will use an email application (like Outlook) or create a spreadsheet for download.
	Print labels - Another action provides an option to choose from 2 formats of label (Avery L7160 - 3 Columns) or (Avery L7163 - 2 Columns) and will produce a PDF from which you can print labels from.

Contact Record

When a contact record is opened it will appear in a new tab within the CMS. This is helpful as it allows you to switch back to the results or open additional contact records.

The contact record will display further details for the contact. This is divided into main details (including primary contact details), further details, additional tabs and posts. The exact tabs will depend on permissions and Database Administrators have the ability to create further tabs for storing diocese specific information.

If permissions allow, there are also options to edit information and download a PDF of the contact record.

Posts

Post Search

This is similar to the contact search but is focused on finding contacts within certain posts and places. The results are slightly different in that they show who occupies the post and where (place). A post is defined by a combination of a contact, role and place so this enables the ability to open either of those records within a tab.

Similar actions are available for post search results as for contact search results. These include:

Download	This provides various methods (Excel, CSV and PDF) to download summary contact, role and place data for the current search results.
Save search	This provides the option to save a search and makes it available to reload the search criteria in the future. It is useful to save this with a meaningful name to help you locate it again in the future.
Mailing	**Mailing** - Depending on permissions, you may have the option to email the contacts for the current search results. This will use an email application (like Outlook) or create a spreadsheet for download. If a post is vacant but has a proxy contact for any reason, this will automatically include the proxy contact in the email list.
Print labels	Another action provides an option to choose from 2 formats of label (Avery L7160 - 3 Columns) or (Avery L7163 - 2 Columns) and will produce a PDF that you can print labels from.

Post Record

When viewing a post, this will display any other attributes for that post, e.g. start and end date and any further comments.

Places

Place Search

The place search enables you to find places by either searching for specific places, a reference code or by place type. These can be used individually or combined to further refine the results.

You have a few options when using the place search field. You can either enter a free text string, e.g. a name of a place or church. As soon as you have entered 3 characters you will start seeing a list of matches and this will further refine as you enter more characters. Click on a place to add it to your search. You also have the option to add additional places that you would like to include in the search.

Alternatively if you click the icon beside the search field you will launch the place browser. This provides a method to drill down the place hierarchy to find places. You can select a place at any level and places below this level will be included within your search results.

Results for this search display the place, type, references and the parent place.

Actions enable you to save search criteria so that you can load them again in future. Also if you have permission you can download place data in excel or CSV format.

Place browser	You will notice an additional tab within place search called 'Place Browser'. This provides another way to navigate directly to a place to open its record.
Place record	You can open a place record within a new tab. Again, this tab structure provides the ability to easily switch between place results and open other place records if required.
	The place record provides further details for the place including building information if relevant.
	The information shown will be dependent on the type of place, so not all the tabs will show if not applicable.

Saved Searches

My Saved Searches

This option in the navigation menu shows a list of all your saved searches and provides the options to either load or remove a saved search. Please note this just removes the saved criteria, it won't remove any contact or place data.

Diocesan Saved Searches

This option in the navigation menu shows a list of saved searches available to any user within the Diocese.