

CMS Help

Getting started with the CMS

Contact Management System

The Church of England CMS
for the viewing of and
management of contacts.

JUNE 2019

Introduction

Getting started with the CMS

The Contact Management System (CMS) is the replacement for the diocesan directory or “People Database” and the website parishinfo.org.

You can use the CMS to look up and contact people who have particular posts in particular places in the diocese.

There are three prerequisites for gaining access to the CMS...

- 1.) to be in it yourself. (e.g. a postholder in the diocese or a *parishinfo.org* user)
- 2.) have an activated *CofE portal* account (read walkthrough 1).
- 3.) have requested and been granted access to the CMS part of the portal (read walkthrough 2).

Note: If you used *parishinfo.org* previously your old login will *not* work.

Most people find using the CMS is easier than the *People Database* but it is not a like-for-like replacement, some elements of the old database have not been carried over and you may need to adjust your workflow or seek extra help.

When you first access the CMS you will only have basic access, we will assign you greater permissions as required.

Getting More Help

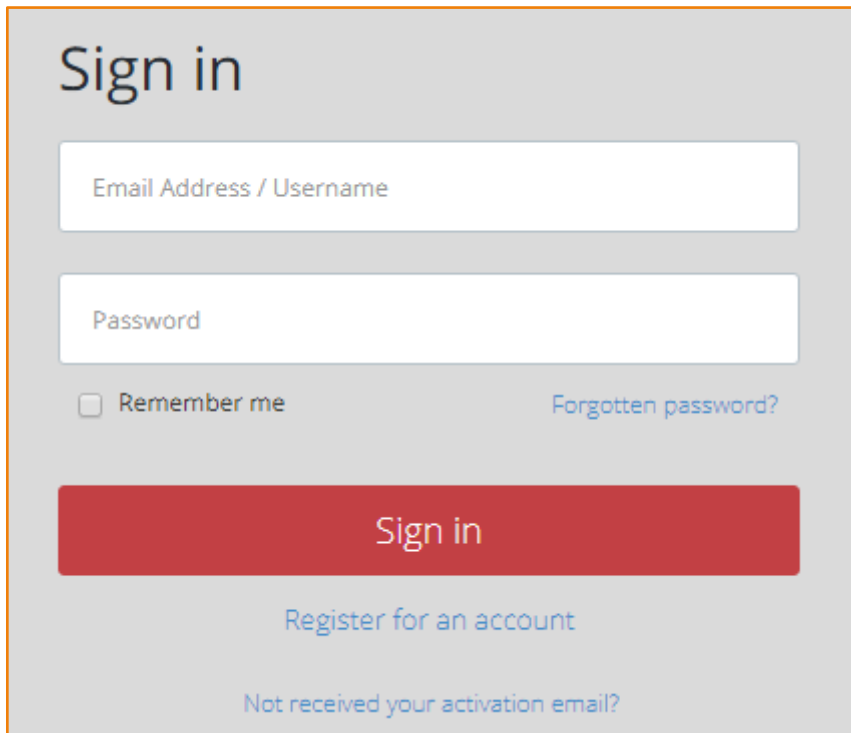
We are here to help, and happy to offer support by email or phone but please ensure you have read this document in full before seeking assistance.

Walkthrough 1

Login to the CofE Portal

The CofE portal gives access to lots of CofE services, including our directory.

Begin by visiting the following website in any browser: cofeportal.org.



The screenshot shows a 'Sign in' form on a grey background. At the top left, the text 'Sign in' is displayed in a large, dark font. Below this, there are two white input fields: the first is labeled 'Email Address / Username' and the second is labeled 'Password'. Under the 'Email Address / Username' field, there is a checkbox labeled 'Remember me' and a blue link labeled 'Forgotten password?'. Below the input fields is a prominent red button with the text 'Sign in' in white. At the bottom of the form, there are two blue links: 'Register for an account' and 'Not received your activation email?'.

You will need to sign in to the portal. If you do not have a login follow the link to [Register for an account](#).

Register

Please include a number and a capital letter and use at least 8 characters.

[Back to the sign in page](#)

Complete the form fields as requested.

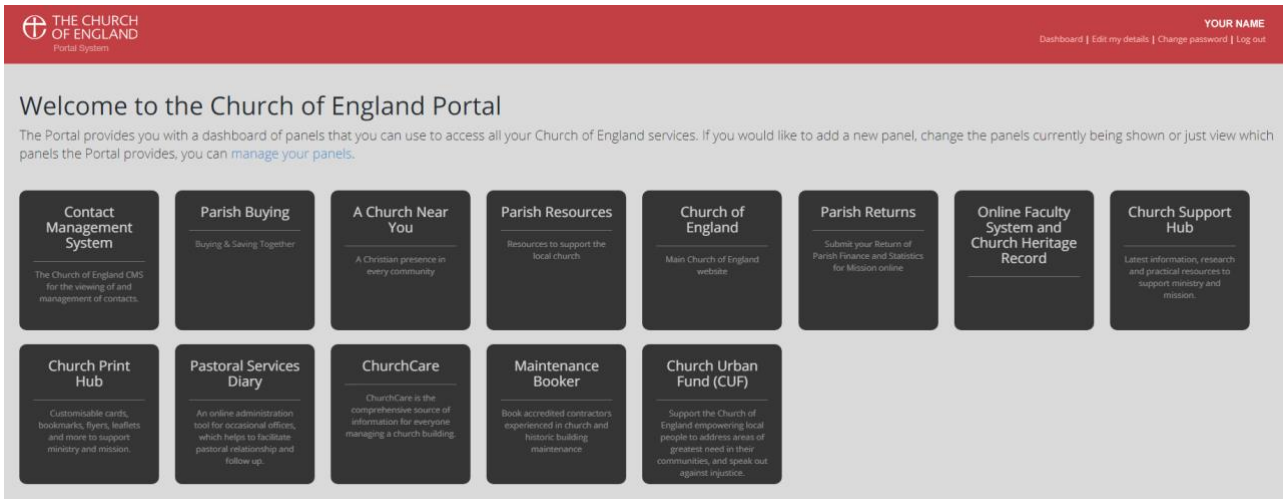
If you are already in the directory it would be best to use the same email address that will be registered within the database. You can use another email address, but this may slow the process of verification up while we match you to the entry in the directory.

The password needs a number, Capital Letter and have at least 8 characters. Type one or [create one here](#).

After submitting the registration form you should receive an email containing an activation link. Click on the activation link to validate the CofE Portal account. This will take you to a sign on page, where you should sign in with your email address and the password you set a moment ago.

Tip: If prompted by your browser to save the password we recommend doing so.

When you have successfully logged into the Portal you should see a series of panels. The contact management system (our directory) is the first one.



Optional : Hide some tabs

Click on “manage your panels” and turn off any panels you do not need to see. Close the manage panels pop-up.

That’s the end of the first walkthrough. Read the next section (Walkthrough 2) to request access to the CMS itself.

Walkthrough 2

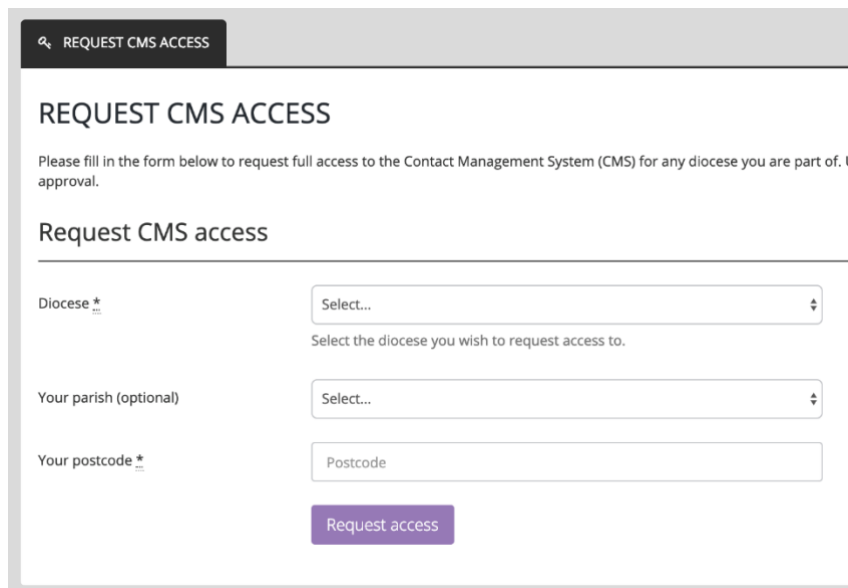
Request CMS access

On the CofE Portal click the tile labelled “Contact Management System.”



In the left-hand sidebar click “[Request CMS Access](#)”.

On the next screen complete the form as requested.

A screenshot of a web form titled "REQUEST CMS ACCESS". The form is set against a light grey background. At the top left, there is a search icon and the text "REQUEST CMS ACCESS". Below the title, a paragraph of instructions reads: "Please fill in the form below to request full access to the Contact Management System (CMS) for any diocese you are part of. U approval." The form itself is titled "Request CMS access" and contains three input fields: a dropdown menu for "Diocese *" with "Select..." as the placeholder and a note "Select the diocese you wish to request access to." below it; a dropdown menu for "Your parish (optional)" with "Select..." as the placeholder; and a text input field for "Your postcode *" with "Postcode" as the placeholder. A purple button labeled "Request access" is positioned at the bottom of the form.

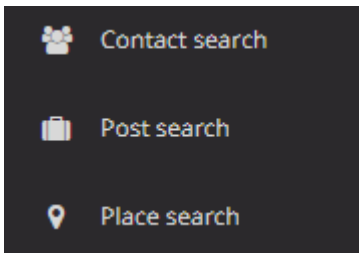
Click **Request access**. We will receive the request and action it as quickly as possible.

Note: If the Diocese of Oxford does not appear in the drop down list of dioceses it means you have already requested access.

Unfortunately, at present, the CMS system does not email you when your request is accepted, but we will contact you if it is rejected for any reason.

We suggest you log in after a few hours or the next day to check.

You will know if you have been given access if these three search links appear in the menu:



That's the end of Walkthrough 2.

Now you have access to the directory learn how to find people using the Simple Searches guide.

