

Getting started on the Church of England Portal



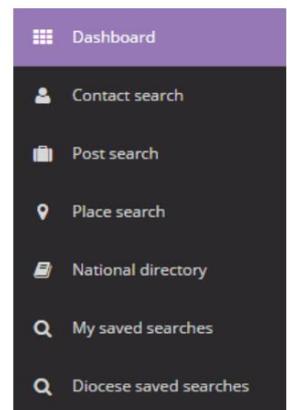
Once you have signed up for the database you will have access to the Portal. The portal is designed to be a one stop location where you will have a single sign on for all of the Church of England Systems. So if you are a treasurer you will be able to access the database and submit your finance returns from one single sign on. This area will be developed over time. These systems have been developed to be simple and intuitive.

Contact Management System

To access the Database you should select the Content Management System tile.

The left hand menu will help you to people, places and also people who are in a post.

- **The Dashboard** will return you to your main page where you can see your own details and also update them. Click edit my contact record at the top right. In there you can also choose what information you would like to share.
- The **Contact Search** area is a simple contact look up. Post Search can be used to find roles in areas. So for example you can use this to find out everyone at a Church or find all Churchwardens in an area.
- The **Place search** is used to find a building or area in the Diocese, this could be a building or an area like a Deanery. At the moment we hold limited information on buildings here but this will be expanded as time goes on.
- The **National Directory** will be the place where anyone can access our data. Only information you have specified as public will appear here.
- **My saved searches** is a place where you can manage complicated searches you have setup for future use.
- The **Diocese saved searches** shows searches set up by the Diocese that maybe useful.



Search Tips



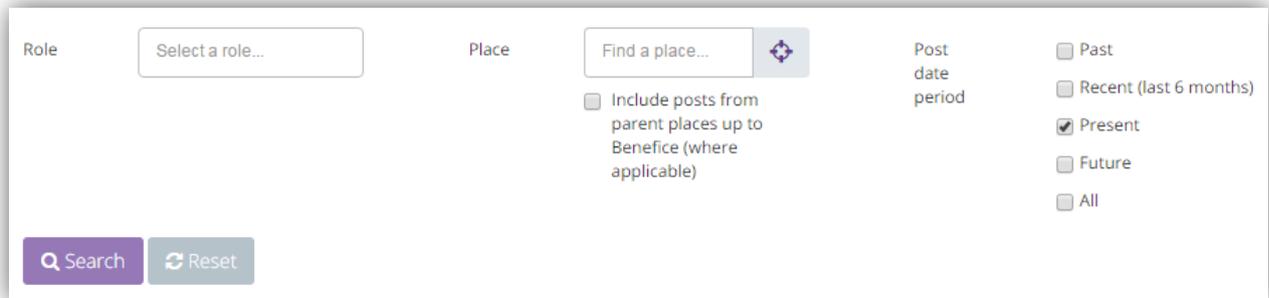
Contact

 Search name fields only?

Contact Search: The search box will return information from the whole database unless you take a few simple steps before hitting the search button. If you were to type Smith and hit search, this would return results wherever Smith can be found, this would include Names and addresses.

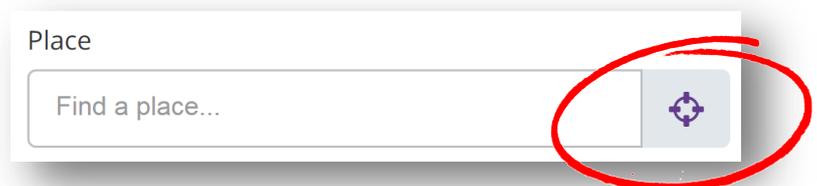
Ticking the box “Search name fields only” will help. You can also type in the box the word AND which will narrow the searches even further, for example if you type **John AND Smith**, this will only return records that contain the names John and Smith rather than all the Johns and all the Smiths.

Post Search



The screenshot shows a search interface with three main sections: Role, Place, and Post date period. The Role section has a dropdown menu labeled "Select a role...". The Place section has a text input field labeled "Find a place..." with a search icon to its right, and a checkbox labeled "Include posts from parent places up to Benefice (where applicable)". The Post date period section has five radio button options: "Past", "Recent (last 6 months)", "Present" (which is selected), "Future", and "All". At the bottom left, there are two buttons: "Search" and "Reset".

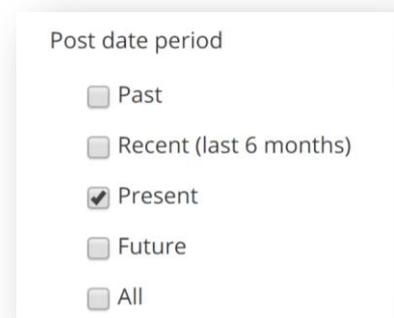
This area is to find post or multiple posts across any combinations of areas. If you do not specify a post in the search box you will get all posts. To find out everyone who is associate with a place just start typing a place in the place box. So for example if you type “Middlesb” a list of all places will be shown in a drop down list. The more you type the shorter the list will become. If you are searching for people in a Parish, my advice is to select the benefice as this will return everyone. If you choose Parish or Church you will only see people associated from that level and below in the parochial structure.



A close-up of the "Place" search box. It features a text input field with the placeholder text "Find a place...". To the right of the input field is a search icon, which is circled in red.

You can also use the place finder icon and search through the parochial structure. You can then use the role box to limit the results further, for example you can search for all Churchwardens in a Deanery, or just the Readers in a Parish. Posts are set to start and finish at certain points of times.

It is possible to look backwards and forwards in a place to see who was or will be in post at any point in time.



A close-up of the "Post date period" filter options. It shows five radio button options: "Past", "Recent (last 6 months)", "Present" (which is selected), "Future", and "All".

If you have any questions, please feel free to contact Lucy Ormondroyd or Kirsty McCullough at the Diocesan office on 01904 699500.