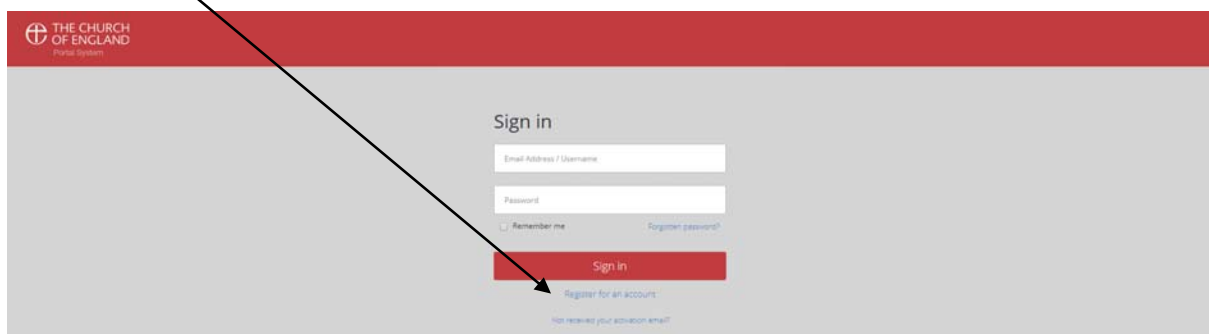


Creating an Account on the C of E Portal

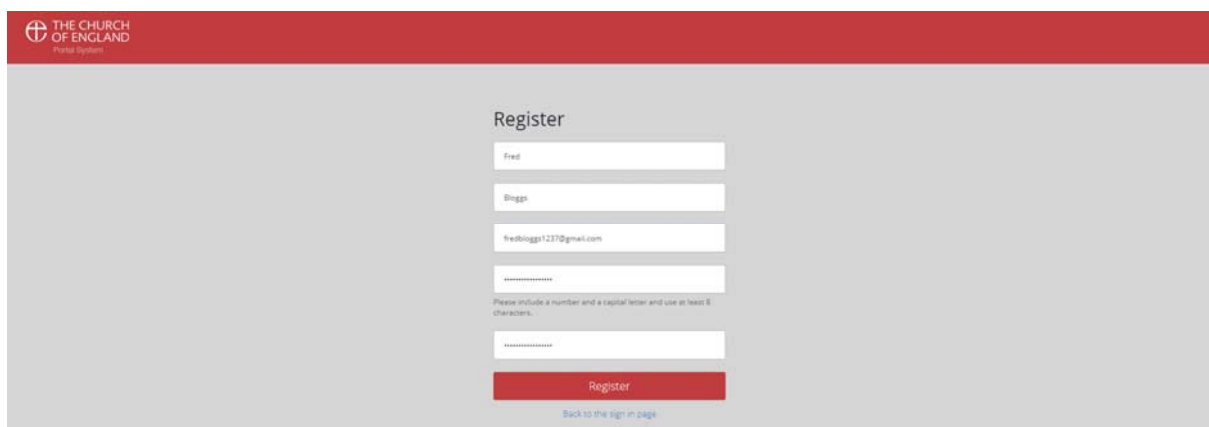
Gaining access to the diocesan database is a two-stage process. The Church of England has developed a **Portal** (a series of tiles pointing to different sites/resources). You first need to create an account there as below:

Click on this link - <http://cofeportal.org>. You may want to add it to your internet favourites so you can access the database easily from now on.

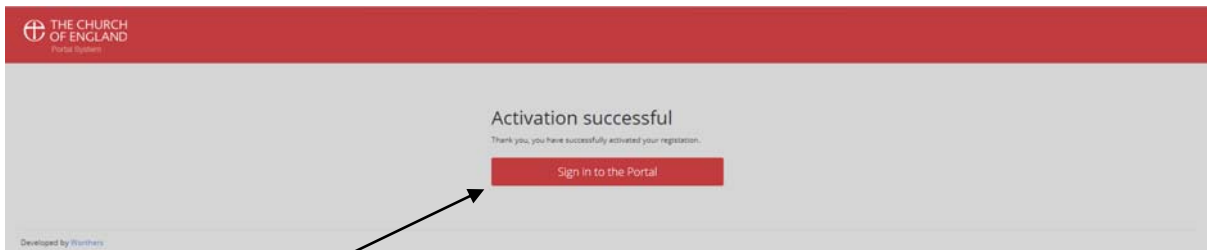
Click on **Register for an Account**.



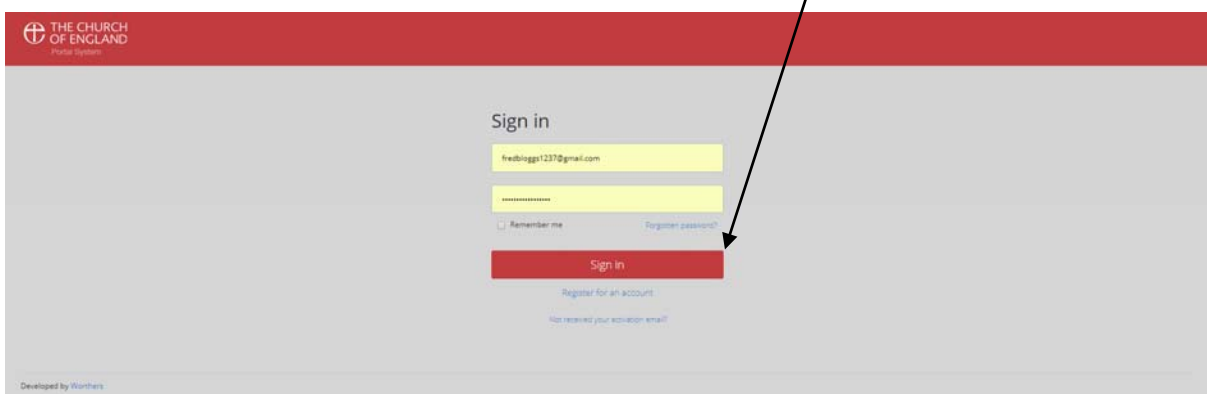
Enter your name, e-mail address and a password. Please make sure your e-mail address is the one that is registered within the database.



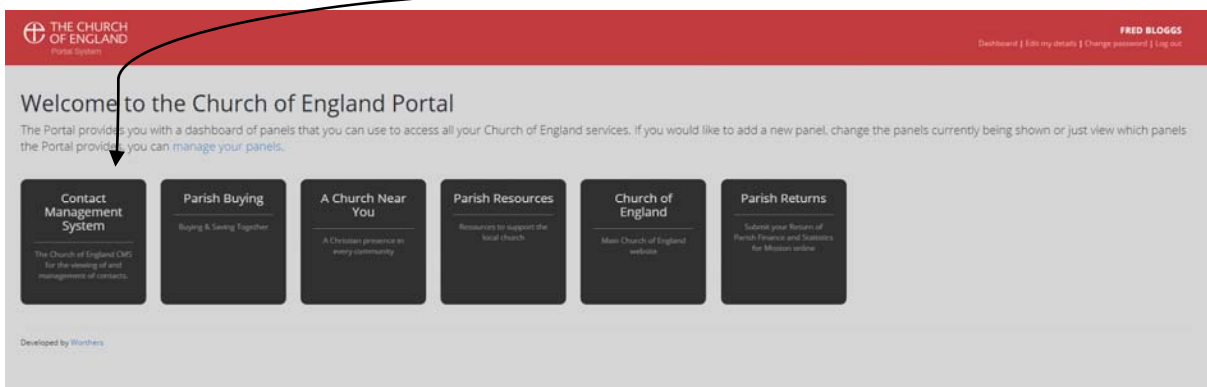
You should receive a 'validation' e-mail automatically. Click on the link within that to return to an **Activation successful** page.



Click on **Sign in to the Portal** to reach the sign-in page where you should enter your e-mail address and the password you set previously, then click **Sign in**.



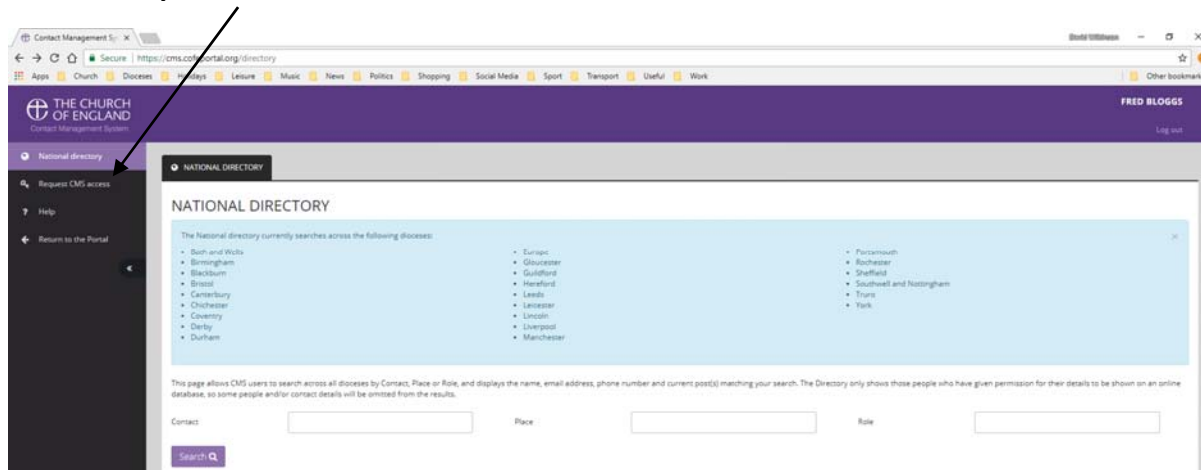
Once in the Portal, you can click on manage your panels to decide which tiles you would like displayed. For the database, click on the **Contact Management System** tile.



Creating an Account on the Diocesan Database (CMS)

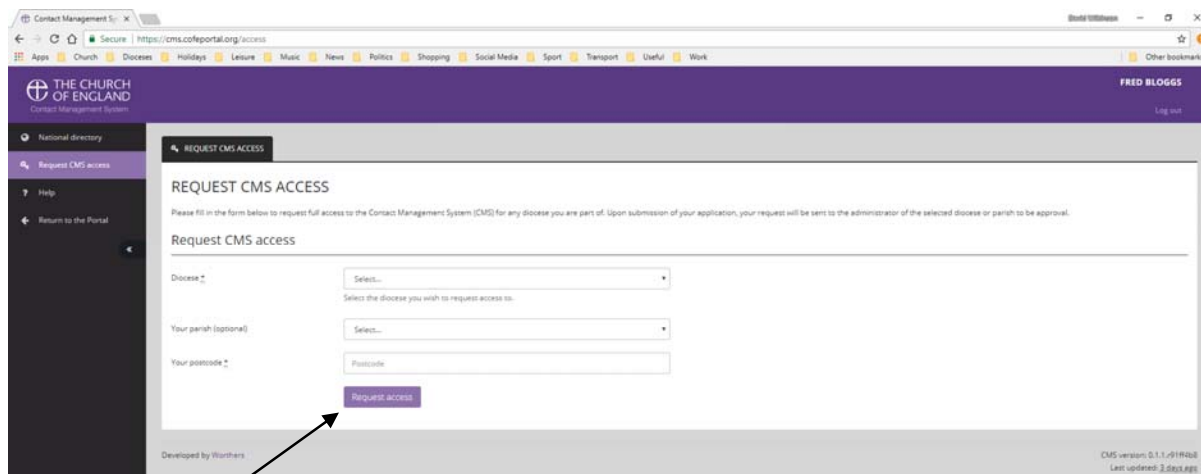
Information about clergy, readers, parish officers and staff is held on the diocesan database (also known as Contact Management System or CMS).

Click on **Request CMS Access** on the left-hand side.



Enter Leeds as your Diocese, enter your parish if you wish (optional), then enter your Postcode.

This postcode matches your account with your record in the database, so you should enter the postcode that your record would use. For example, members of Church House staff would likely use LS1 2EX and churchwardens would likely use their home postcode.



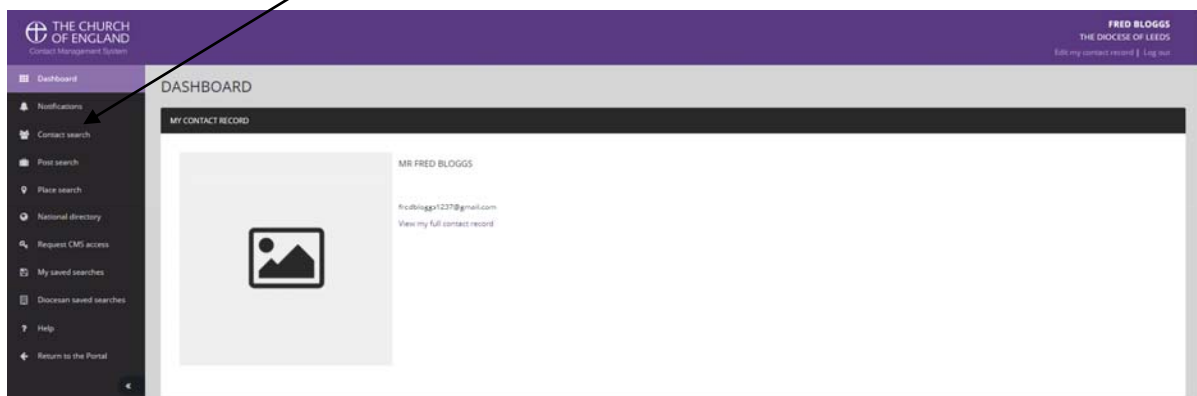
Click **Request access**. The system will now ask the administrator of the database if access should be granted. This requires a real person to check everything is OK and to apply the relevant permissions to the database. As soon as this verification step has been completed, you will have access to the database.

Searches on the Diocesan Database

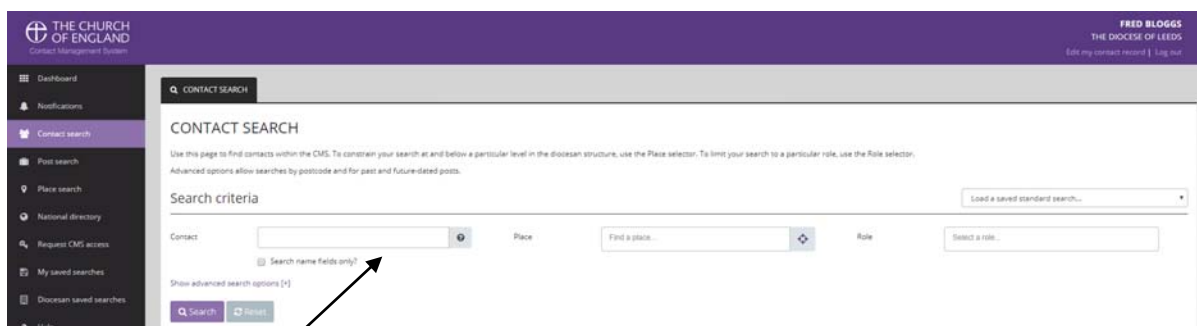
Depending on the information you want to find out, there are four different types of searches you can perform on the database:

1 Contact Search

If you know the name (or other details) of the person you want to find, you should use this option. To start, click Contact Search in the left-hand menu.



You will then be presented with various search options.



Use the **Contact** field to search using information about the person you are searching for. This can include their first name, surname, a combination of the two*, their postal address or e-mail address. If you get too many results, you can tick **Search name fields only** to narrow it down.

** To search using someone's first name and surname (or any other combination of search words), you need to include the word **AND** (in capitals) between words, otherwise the database will search for anyone whose record contains any of the individual words. For example, a search for **fred bloggs** produces 44 results but **fredANDbloggs** only produces 1!*

You can also use the **Place** field and/or the **Role** field in combination with the Contact field to narrow down the results.

When you have entered the search terms you want, click the **Search** button. When you have located the specific record you want, you can if necessary click the **Open contact** button for more details.

The screenshot displays the 'CONTACT SEARCH' interface of the Church of England Contact Management System. The page is titled 'CONTACT SEARCH' and includes a sidebar with navigation options like 'Dashboard', 'Notifications', 'Contact search', 'Post search', 'Place search', 'National directory', 'Request CMS access', 'My saved searches', 'Diocesan saved searches', 'Help', and 'Return to the Portal'. The main content area shows search criteria for 'Fred Bloggs' and a single result for 'Bloggs, Mr Fred'. The result table has columns for Name, Email, Phone, Present posts, and Action. The 'Action' column for the result contains a purple button labeled 'Open contact'. Two arrows point from the text above to the 'Search' button and the 'Open contact' button.

THE CHURCH OF ENGLAND
Contact Management System

FRED BLOGGS
THE DIOCESE OF LEEDS
Edit my contact record | Log out

CONTACT SEARCH

Use this page to find contacts within the CMS. To constrain your search to a particular level in the diocesan structure, use the Place selector. To limit your search to a particular role, use the Role selector. Advanced options allow searches by postcode and for past and future posted posts.

Search criteria Load a saved or shared search...

Contact: Place: Role:

Search name fields only?

Show advanced search options [v]

RESULTS 1 RESULT FOUND

Results ordered by **Surname then Known As (A-Z)**

Name	Email	Phone	Present posts	Action
Bloggs, Mr Fred	fredbloggs1237@gmail.com		Contact @ Leeds (Diocese)	<input type="button" value="Open contact"/>

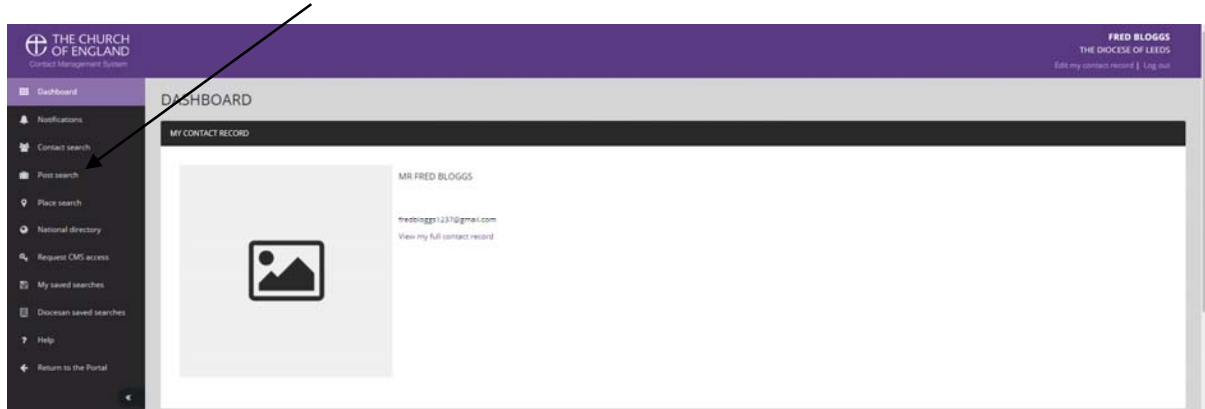
Displaying results 1-1 of 1 result found.

Developed by Worthers

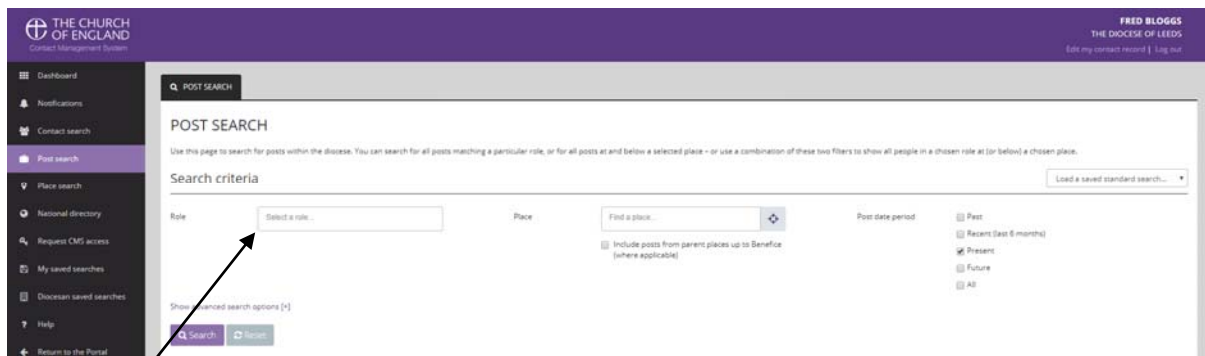
CMS version: 0.1.1-06a3d8
Last updated: 17 minutes ago

2 Post Search

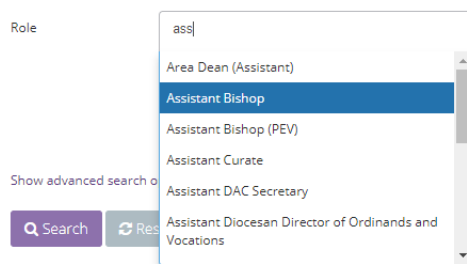
If you don't know the name of the person you want to find but you know which post they hold, or if you want a list of all the people holding a particular post, you should use this option. To start, click Post Search in the left-hand menu.



You will then be presented with various search options.



Use the **Role** field to select the role you want to find (from a pre-set list). When you start typing the name of a role, all the options to choose from will appear in the box. A list of the most popular roles you may wish to search for is at the end of this section.



You can also use the **Place** field in combination with the Role field to narrow down the results, for example, to find all the Assistant Curates within Armley Deanery. (You can also use the **Post date period** options to search for post or future posts, though the resulting data may well be incomplete or misleading).

When you have entered the search terms you want, click the **Search** button. When you have located the specific post you want, you can choose one of three options:

[Open post](#) [Open place](#) [Open contact](#)

- Click **Open post** to see information about the post, such as start and end dates
- Click **Open place** to see information about the place to which the post is attached, such as reference numbers or statistical information where available
- Click **Open contact** to see information about the contact, such as name and address details

Popular roles to search for

Clergy

Archdeacon

Area Dean

Assistant Curate

Associate Priest

Bishop

Canon – [type]

Chaplain

Deacon – Permanent

Dean

General Licence

Incumbent

Lecturer

Minister

Mission Priest

Pioneer Minister

Priest in Charge

Priest Vicar

Team Rector

Team Vicar

Parish Officers

Churchwarden

Deanery Synod Representative

PCC Secretary

PCC Treasurer

Parish Disability Officer

Parish Electoral Roll Officer

Parish Environment Officer

Parish Giving Officer

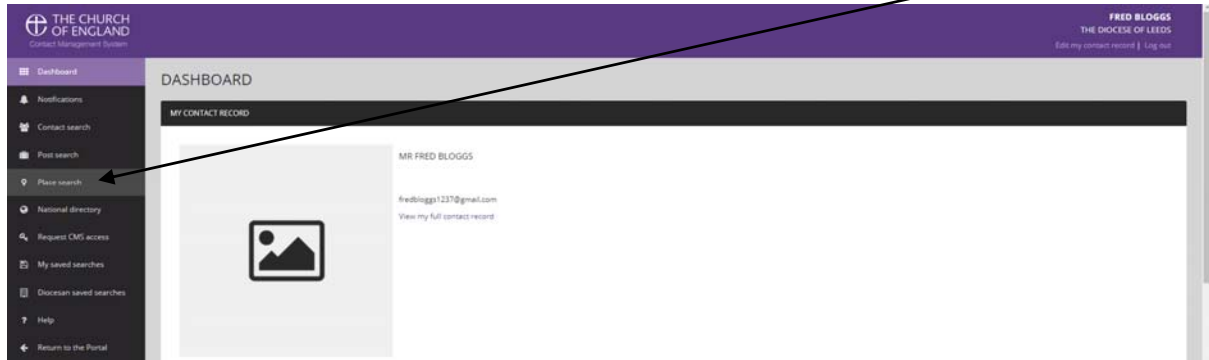
Parish Safeguarding Officer

Staff

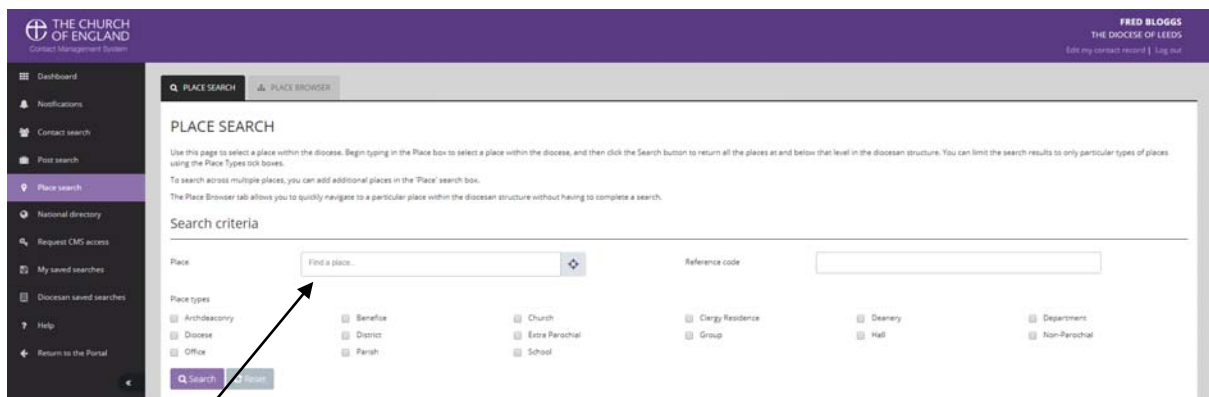
For a full list of Church House staff, leave the **Role** field blank but enter York Place [Office] in the **Place** field

3 Place Search

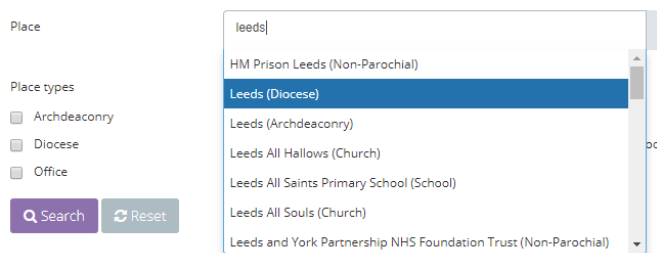
If you want to search for a place within the Diocese (Archdeaconries, Deaneries, Benefices, Parishes, Churches, Schools, Hospitals, etc), you should use this option. To start, click Place Search in the left-hand menu.



You will then be presented with various search options.



Use the **Place** field to select the place you want to find (from a pre-set list). When you start typing the name of a place, all the options to choose from will appear in the box.



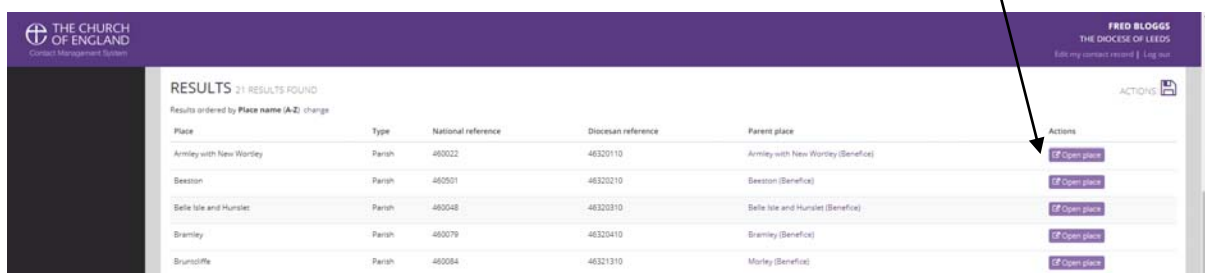
Alternatively, you can tick one of the **Place type** boxes for a full list of places of a particular type (for example, all parishes).



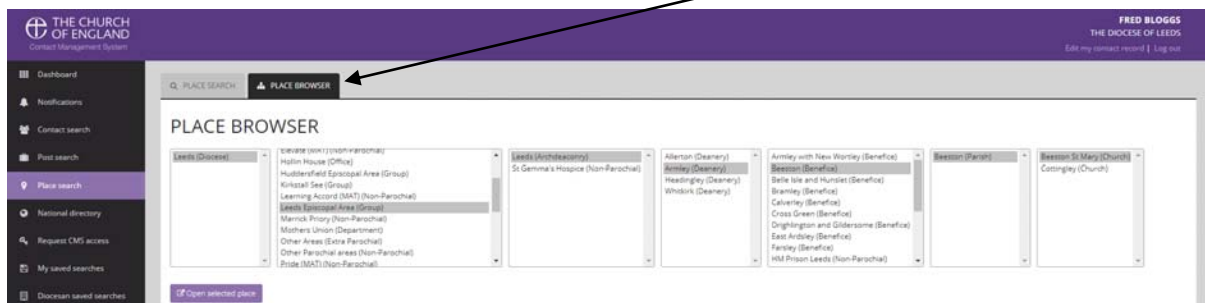
You can search for all places of a particular type within an area (for example, all parishes within Armley Deanery) by entering the search area in the **Place** field then *a/so* ticking a **Place type** box.



When you have entered the search terms you want, click the **Search** button. When you have located the specific place you want, you can if necessary click the **Open place** button for more details.

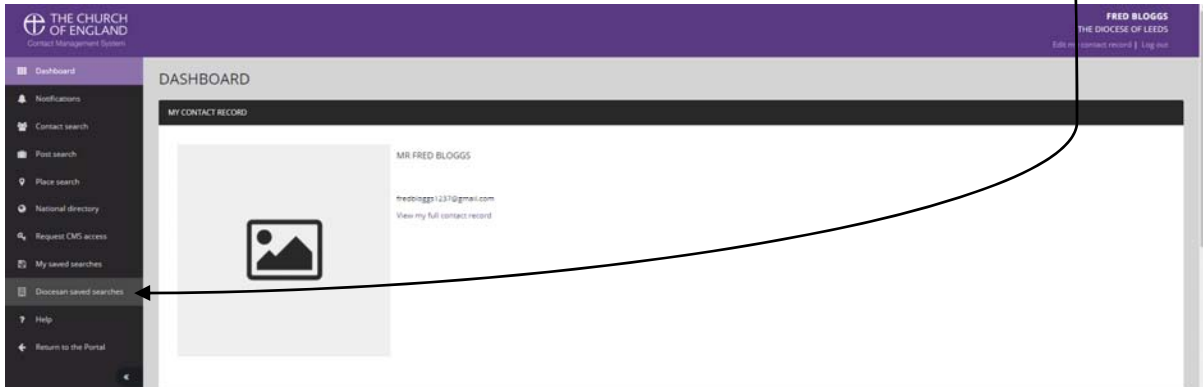


To 'browse' the places in the Diocese, you can choose the Place Browser tab, then click on places to open up any places below them in the structure.

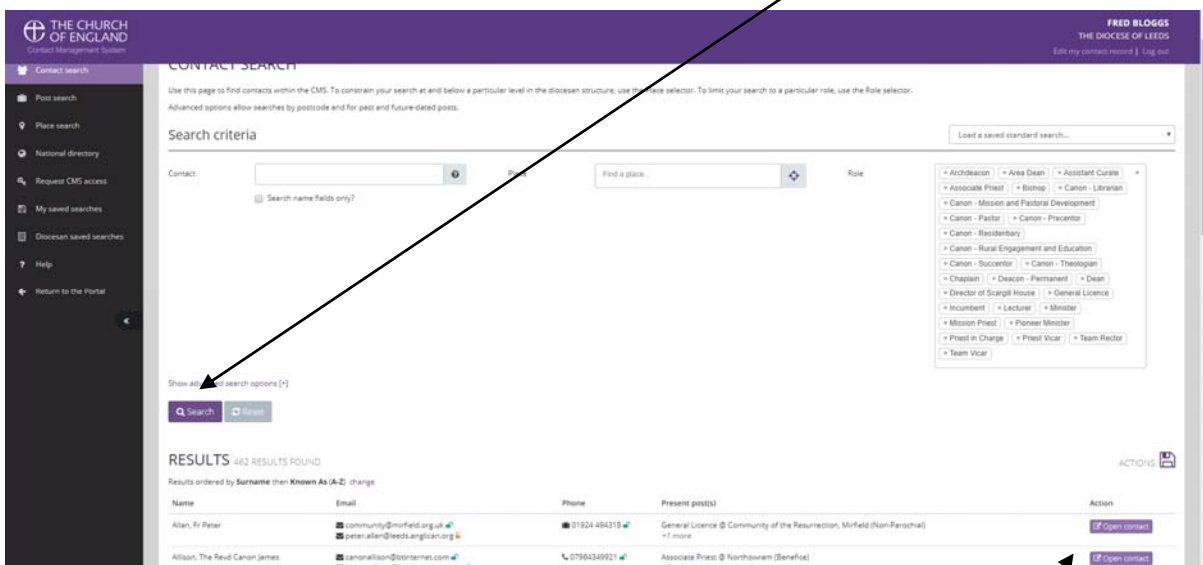


4 Diocesan Saved Searches

There are a selection of searches which have already been put together and saved, mainly groupings of clergy by area, which may be useful. To start, click Diocesan Saved Searches in the left-hand menu.



When you have found the saved search you want, click the Load button. On the next screen, ignore all the search criteria and just click on the Search button.



Depending whether the saved search is a contact, post or place search, there will be a number of additional buttons alongside the results, which you can click for further information.