

Database tips

Portal

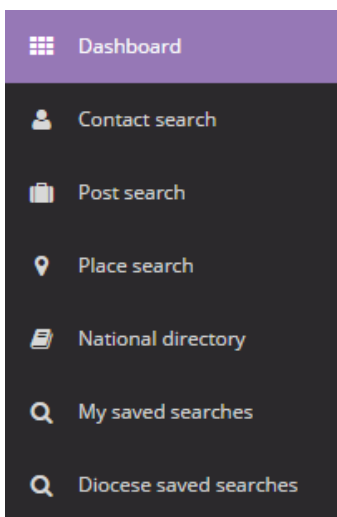
Once you have signed up for the database you will have access to the Portal. The portal is designed to be a one stop location where you will have a single sign on for all of the Church of England Systems. So if you are a treasurer you will be able to access the database and submit your finance returns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

Database

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

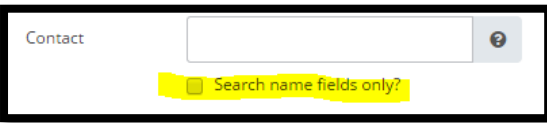


The Dashboard will return you to your main page where you can see your own details and also update them. Click edit my contact record at the top right. In there you can also choose what information you would like to share. The **Contact Search** area is a simple contact look up. Post Search can be used 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.

Tips

Contact Searches

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,



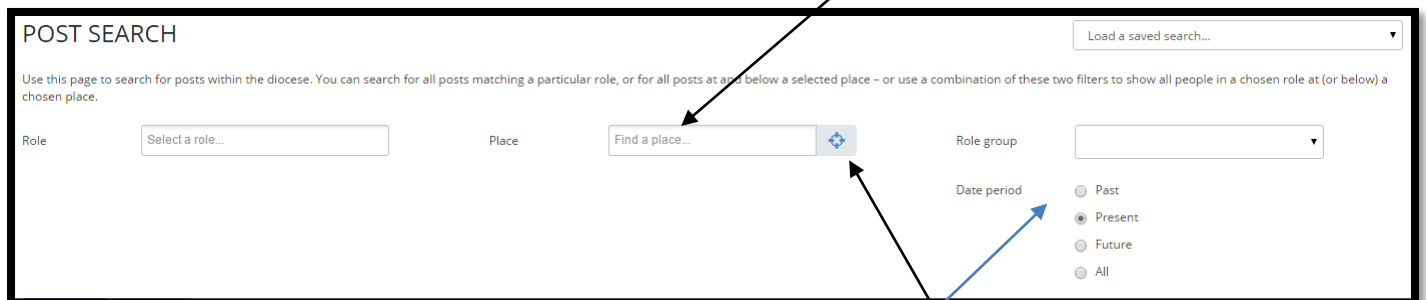
this would include Names and addresses. Ticking the box “Search name fields only” will help. You can also type in the box the word AND which will narrow the searches even further, for example if you type John AND Smith, this will only return records that contain

the names John and Smith rather than all the Johns and all the Smiths.

Post Search

This area is to find post or multiple post 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 “Southwe” 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.



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.

If you have any questions, please feel free to contact Fraser McNish or Clare Hardy at the Diocesan office. 01636 814331