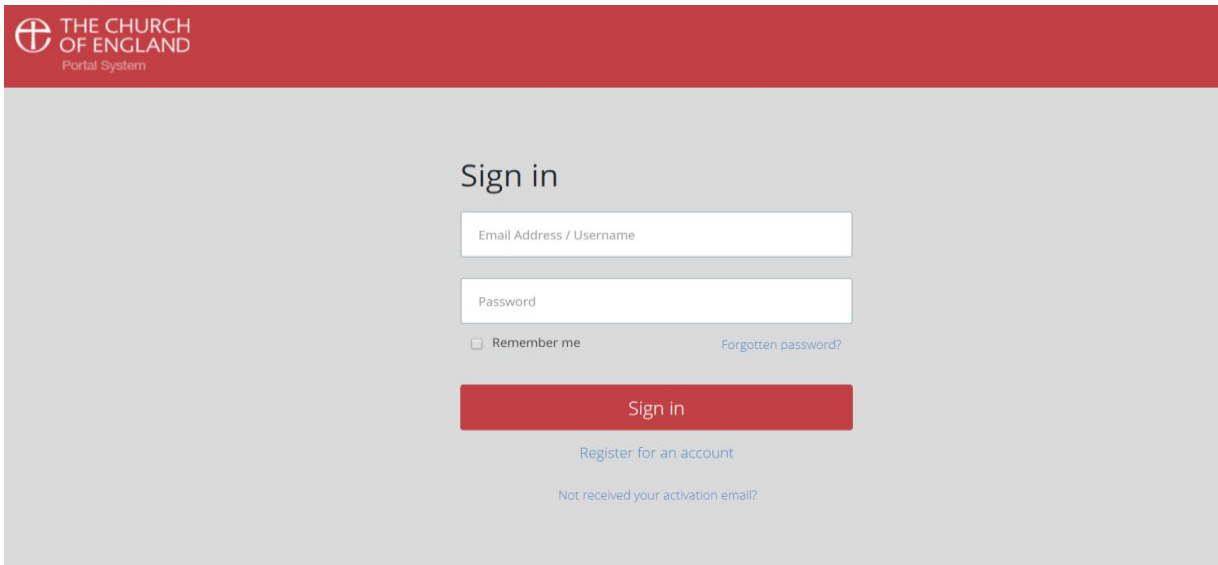


## How to setup access to the online database

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You need to follow the below instructions to set up your access.

- Go to this website <https://cofeportal.org/login> (You should bookmark this address as this is where you will access the database from now on).



The screenshot shows the login page for the Church of England Portal System. At the top left, there is a red header with the Church of England logo and the text 'THE CHURCH OF ENGLAND Portal System'. The main content area is light grey and contains the following elements:

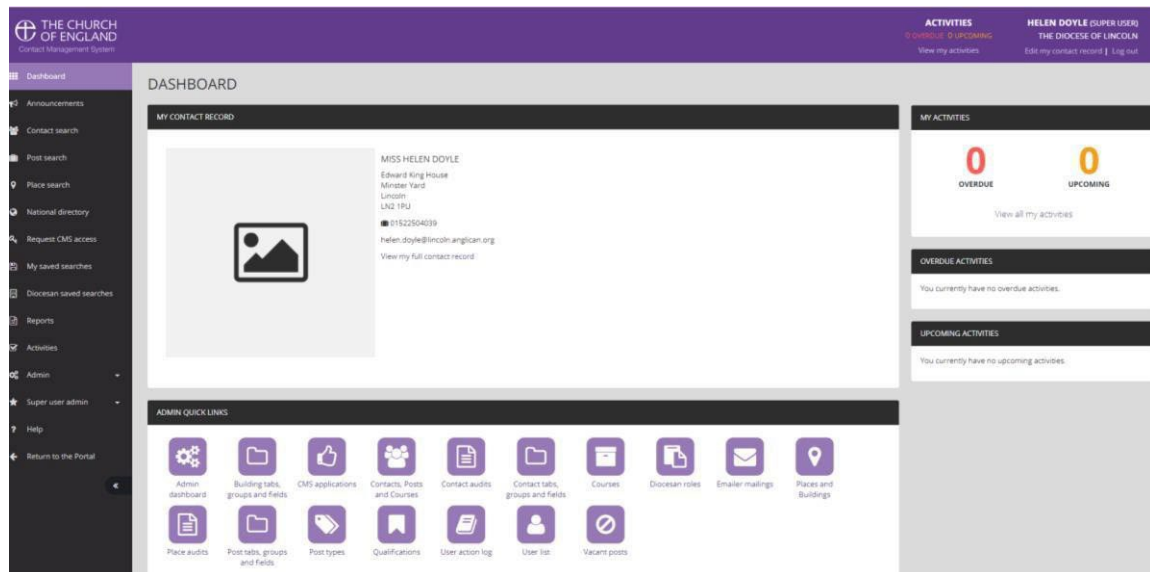
- The heading 'Sign in'.
- A text input field labeled 'Email Address / Username'.
- A password input field labeled 'Password'.
- A checkbox labeled 'Remember me'.
- A link labeled 'Forgotten password?'.
- A red button labeled 'Sign in'.
- A link labeled 'Register for an account'.
- A link labeled 'Not received your activation email?'.

- Click on 'Register for an account'.
- Type in your full details. After submitting this information go to your email (it may be in your junk) and click on the link to validate your account.
- This will take you to a sign in page where you should sign in with your email address and the password you set a moment ago.
- Now click on Edit your services.
- Tick all the boxes on offer and then click on 'Done'. You will then see that the portal can link you to many other Church of England resources, such as the Online Faculty System and Parish Buying. Your portal login will enable you to link to these sites, so you will only need one password and user name to access all of these services.



- Now click on the tile which says Contact Management System.
- Now click on the Request CMS access (Left hand side).
- Choose the Diocese of Lincoln from the drop-down box.
- Choose your Parish (you can leave this blank if your role is not within a Parish)
- Enter the Postcode. This postcode matches your new account with a record in the CMS database, so you should enter the postcode that your record would use. For example, Diocesan Staff should use LN2 1PU, a Churchwarden would use their home postcode.
- I would strongly recommend not ticking the box to make your details private, this would result in people not being able to find you. In the settings you can be very specific about what data is shared within the Diocese and what may be made publicly available.
- 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 the verification step has been completed you will then have access to the database.

## Hints and tips for using the online database



- When you enter the Contact Management System, you will come to your dashboard, which enables you to review and edit your own details. Options for searching for contacts can be found down the left side of the page, and also along the bottom whilst you are viewing your dashboard.
- There are three main ways to search for data on the CMS, by searching for a person, a post or a place.

### Contact Search

- If you know the name of the person you are looking for, you should click on 'Contact Search' and type their details into the contact search criteria. If you know the first and last name of the contact, you should search them using AND in capital letters to separate the fields.
- The search below was for janeANDBloggs. You then click 'Search' and you will find all of the Jane Bloggs who have a confirmed role within the diocese.

Search criteria

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Contact   Place

Search name fields only?

Show advanced search options [+]

**RESULTS** 1 RESULT FOUND

Results ordered by **Surname** then **Known As (A-Z)** [change](#)

Name	Email	Phone	Present post(s)
Bloggs, Ms Jane			Miscellaneous @ Lincoln (Diocese)

- Basic contact information is shown in the search, but you can also open the contact record for more detailed information such as a full address.
- You are also able to add details of the place (this field is auto-populated with our list of places) or a role (again using our list of active roles), so in the event you knew a Ms Bloggs was the Churchwarden in the Christianity deanery, but didn't know her first name or exactly which parish, you could still find the details.

## Post Search

Search criteria Load a saved standard sea

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Role  Place  Post date period  Past  Recent (last 6 months)  Present  Future  All

Show advanced search options [+]

places (cable)

Bitchfield St Mary Magdalene (Church)

Fleet St Mary Magdalene (Church)

Gedney St Mary Magdalene (Church)

**Lincoln St Mary Magdalene (Benefice)**

Lincoln St Mary

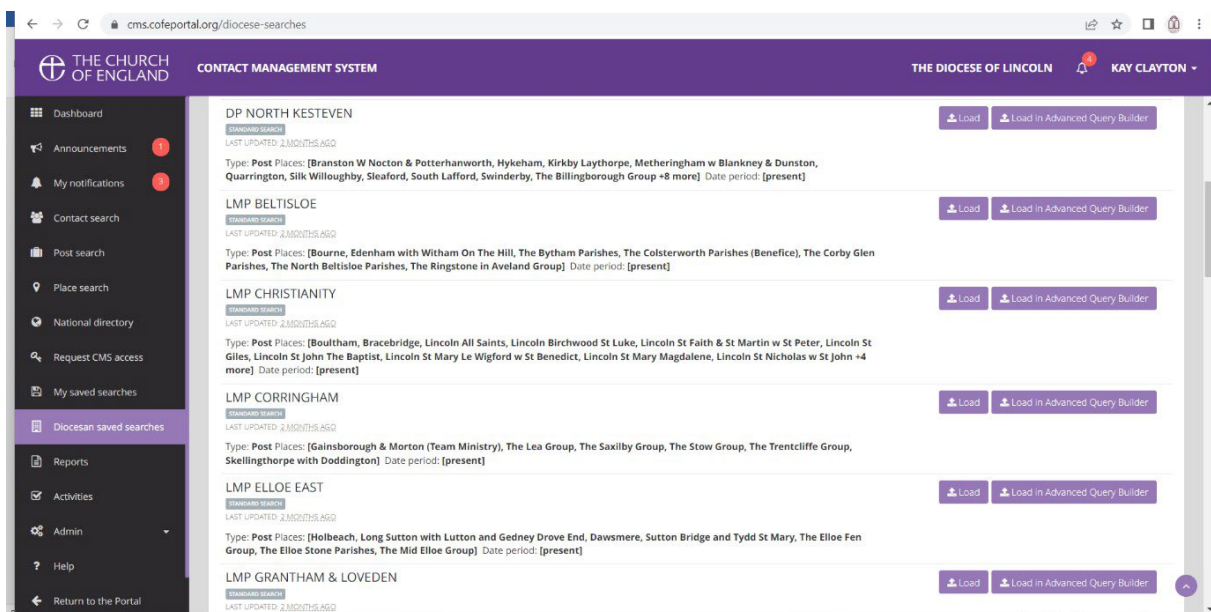
- The post search function is a different way for you to search for a contact if you know what role they have and where, but not their name. This can also be carried out under 'Contact Search' as we have seen, but provides you with a list of roles and who they are assigned to, instead of being person specific. For example, Jane Bloggs may come up more than once as she is both a Churchwarden and the Treasurer of her parish.
- The post search function also allows you to select the place and tick the box below to 'include parent places up to Benefice level'. This is useful as parish officers like Churchwardens, Treasurers and PCC Secretaries are stored against a parish, whereas anyone who holds the Bishop's License such as the Vicar, is held against the benefice.

Place

Include posts from parent places up to Benefice (where applicable)

- There are different titles given to our Vicars, depending on the license they have been given, the nature of their post, whether there is a pastoral scheme in place and the history of the parish. If you are unsure of the Vicars exact title, it may be quicker to search the place without a role populated, as this will show you everyone who is connected to the benefice including the Vicar.

## Diocesan Saved Searches



- Under 'Diocesan saved searches' down the left-hand side, you can load pre-saved searches which may assist you, particularly when looking for those in your DP or LMP. There is a search which loads the fields needed to find all active clergy. To find active clergy, churchwardens, ALMs readers etc.
- Click Load at the side of the LMP or DP you require and then click into the Role. From there a list of roles comes up. For example, you want to know who are the churchwardens in that DP/LMP. You then press search and they will all be entered below.

These hints and tips are designed to get you started, but we hope that you will find the CMS to be fairly intuitive and easy to use. There is also a 'Help' button down the left side of your screen, which includes further instructions and a tutorial video.

Please remember that our database is only as good as the information we receive. So, if you know a person has left or has recently joined your Parish. Please do let us know.

**If you experience any problems or need further advice on additional levels of permissions you may require, please be in touch with the parish support team, on 01522 504050 or [Parishresource@lincoln.anglican.org](mailto:Parishresource@lincoln.anglican.org)**