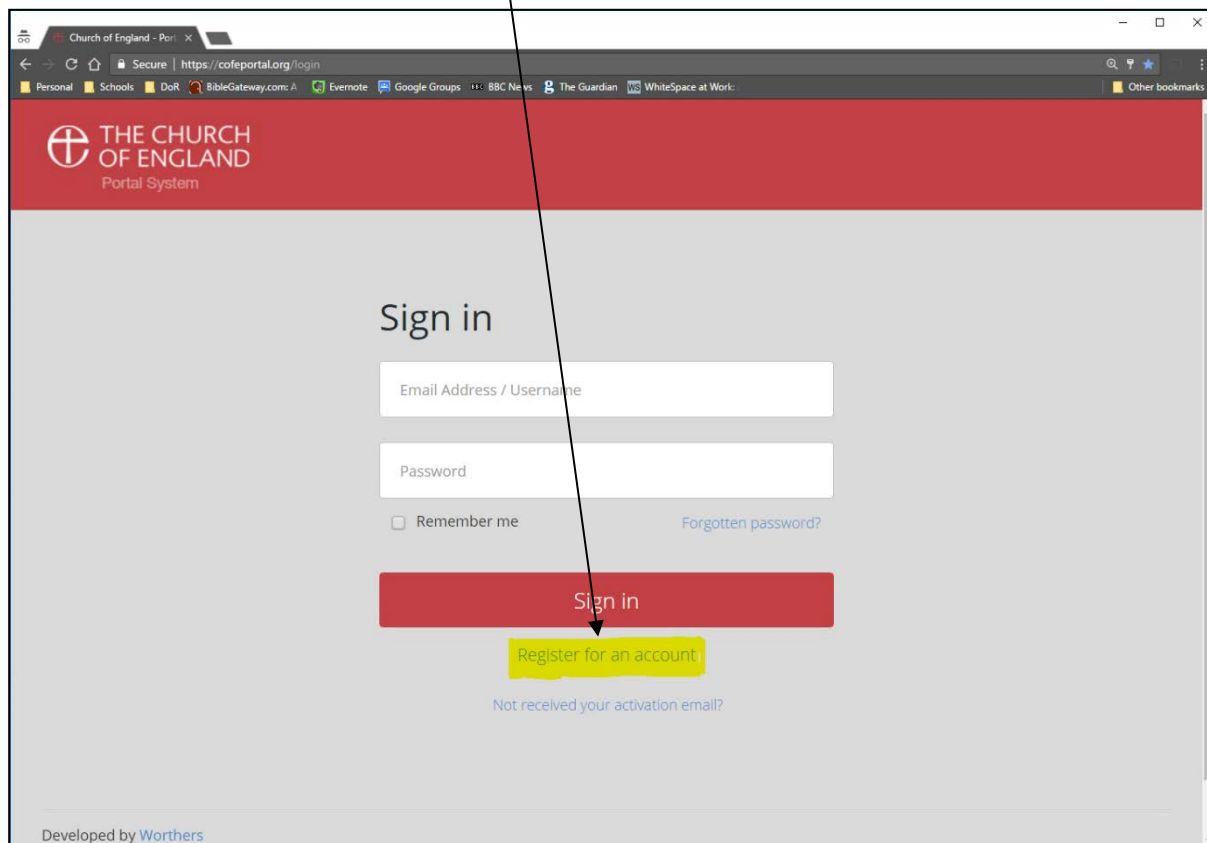


Rochester Diocese Contact Management System: Registration Instructions

Please follow the instructions below to set up your access to the Diocesan Contact Management System.

- Go to this website: <https://cofeportal.org/login> - we recommend you bookmark this address as this is where you will access the database from now on.
- Click on **Register for an Account**



- Type in your full details. Please make sure that you use the same email address that will already be registered within the database (if you are already in the current database). Choose a password that you will remember, and which conforms to the password rules of **minimum length of 8 characters** containing at least **one upper case letter** and **one number**.
- After submitting this information, the system will send you an email. Open the email and click on the link within it to validate your account.
- This will take you back to the sign in page where you should then sign in with your email address and the password you have just set.
- Click on the tile which says **Contact Management System**.
- Click on **Request CMS access** on the left-hand side of the page.
- Choose **Rochester Diocese**.
- Choose your parish (you can leave this blank if your role is not within a parish).

- Enter the postcode. This postcode links your new account with a record in the CMS database, so you should enter the postcode that your record would use which will likely be your home postcode.

The system will now send a request to the administrators of the database asking if access should be granted. This requires a real person to check everything is OK and to apply the relevant permissions to the account: please allow time for them to complete this. As soon as the verification is done, you will be notified and access to the database will be immediate.

Once access is gained to the database, the first page will be the personal contact record which you are asked to view and verify. Clicking on **View my full contact record** at the top of the right-hand side of the screen allows the details to be edited.

It is possible to be very specific about what data is shared within the Diocese and on the public and National Directory. Click the drop-down boxes to specify how you want to share your data. More detail on this is contained in the CMS User Guide (see below for details of where to obtain this). You can adjust your privacy settings at any time in the future.

Users are asked to strongly consider which details they make private: this could result in people being unable to find you!

Basic Search Instructions

Searches are made through three contexts: People, Posts or Places.

To find a **person**, click on **Contact search** on the left-hand menu, enter the surname in the "Contact" field and tick the Search name fields box just below.

To find a **post holder**, click on **Post search** on the left-hand menu and enter the post you are searching for in the "Role" field. To further refine your search, enter the place details in the "Place" box – otherwise you will get all post holders of that type across the Diocese appearing!

If you need to find **all post holders in a particular place**, use the **Post search**, leave the role field blank and select the place you wish to search under. *Note: most parish-based roles are set at Benefice level.*

To find a **place**, click on **Place search** on the left-hand menu and enter the details in the "Place" field.

Further Information & Instructions

For more detailed instructions on how to search the database, you will need to refer to the user guide for the CMS. This is available as a PDF download from the IT page on the Resources section of the Rochester Diocese Website – www.rochester.anglican.org/it.

What if I need help?

If you are having trouble signing up, then we are more than happy to help. We would ask that you send us an email rather than phoning us – whilst we generally work Monday to Friday, 9am-5pm, there are times when we are in meetings, off site, or actively dealing with issues.

Please email CMSSupport@rochester.anglican.org and Iain Ambler, IT Manager will endeavour to get back to you as soon as he can.

What about changes to parish roles?

For any changes to roles within your parish or deanery such as PCC Secretary, Treasurer, Deanery Lay Chairs, Synod Representatives etc, please continue to report these in the usual way following an APCM, or email CMSChanges@rochester.anglican.org and Suzanne Rogers will process these as soon as she can.

Clergy and Lay Ministry changes/appointments are also dealt with by Suzanne as and when people are appointed to their new roles.