

CMS Conference Administrator User Guide

Resetting User's Passwords

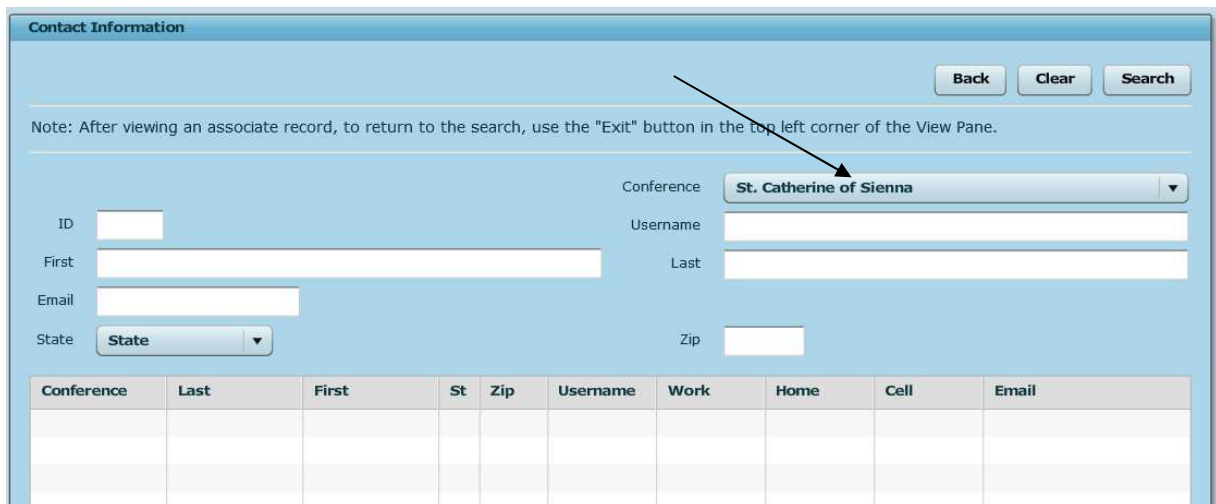
The Conference Administrator now has the ability to reset passwords for all users within their conference.

NOTE: The conference member must also have a role other than Conference Member in order to log into CMS.

Go to Search>Contact Information



Select your conference from the drop down list box if the default is not entered.



Locate the user by entering any of the available search criteria (such as, First, Last name)

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Click on the user in the search results grid

The screenshot shows a 'VIEW PANE' window with a red 'EXIT' button in the top left. The main content area is titled 'Contact Information' and contains a note: 'Note: After viewing an associate record, to return to the search, use the "Exit" button in the top left corner of the View Pane.' Below the note are several input fields: 'ID', 'First' (with 'janice' entered), 'Email', 'State' (with a dropdown menu), 'Conference' (with 'Test' selected in a dropdown), 'Username', 'Last' (with 'tester' entered), and 'Zip'. At the bottom, there is a table with the following data:

Conference	Last	First	St	Zip	Username	Work	Home	Cell	Email
Test	Tester	Janice	GA	30000	jttester	770-928-7804			

An arrow points from the 'First' field to the 'First' column in the table.

Click the Change Password button

If you do not see the Change Password button make sure the potential user has a role in addition to that of Conference Member.

The screenshot shows an 'Associate Record' window with an 'OK' button in the top right. Below the title bar are three tabs: 'Associate', 'Roles', and 'Volunteer Tasks'. At the bottom right, there are two buttons: 'Change Password' and 'Edit'. An arrow points from the 'Change Password' button to the 'Associate' tab.

Enter the New Password and Re-Enter Password then click the Submit button.

The screenshot shows a 'Change Password' window with a 'Back' button and a 'Submit' button in the top right. Below the title bar are three input fields: 'Username' (with 'jsigurdson' entered), 'New Password *', and 'Re-enter New Password'. Arrows point from the 'New Password' and 'Re-enter New Password' fields to the 'Submit' button.

Notify user of new password.

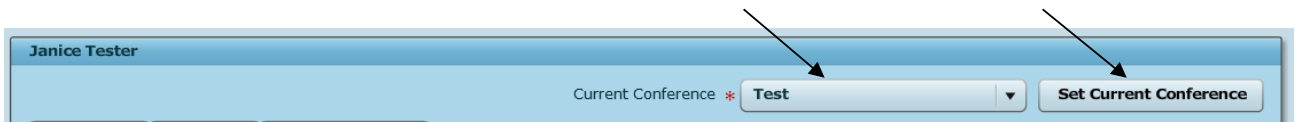
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Conference members need to know

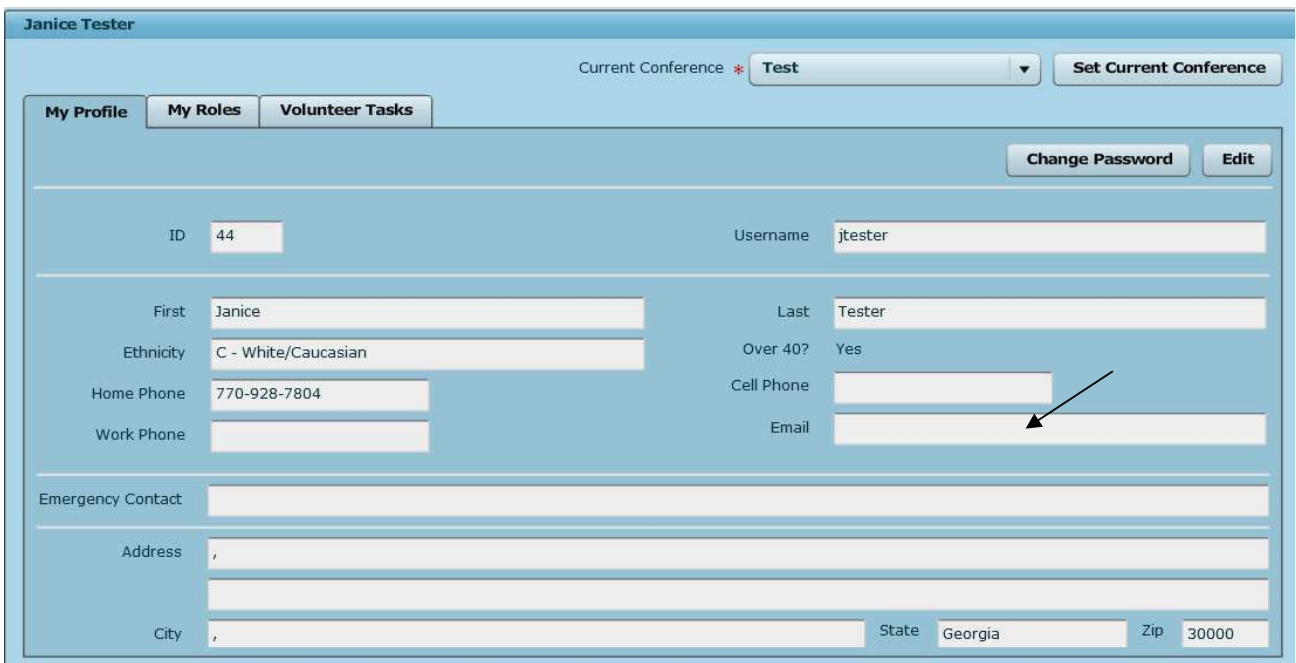
Select My Profile



Make sure their conference is selected and Set Current Conference (this needs to be done only once)



Ensure that all information including email address is present and correct. You cannot receive system emails that your case is ready to close if you do not have a good email address. If you are a treasurer you cannot receive "new check request" emails if you don't have a valid email address.



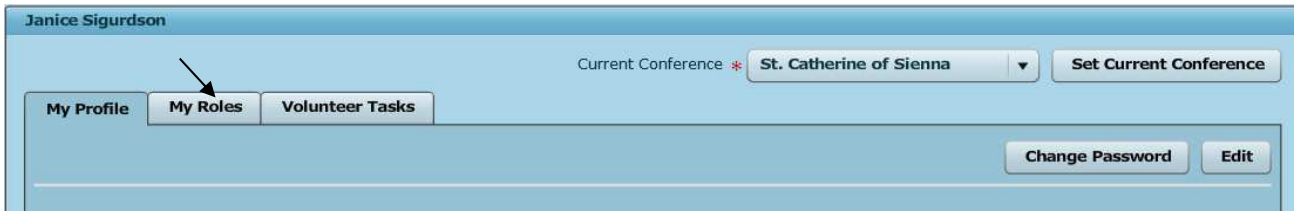
A screenshot of the 'My Profile' form for Janice Tester. The form is titled 'Janice Tester' and has a 'Current Conference' dropdown menu set to 'Test' and a 'Set Current Conference' button. The form is divided into sections: 'My Profile', 'My Roles', and 'Volunteer Tasks'. The 'My Profile' section contains the following fields: ID (44), Username (jtester), First (Janice), Last (Tester), Ethnicity (C - White/Caucasian), Over 40? (Yes), Home Phone (770-928-7804), Cell Phone, Work Phone, and Email. There are also fields for Emergency Contact, Address, City, State (Georgia), and Zip (30000). An arrow points to the Email field.

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My Roles



Clicking this tab will show the user what roles he is assigned in CMS. If your user thinks these roles are incorrect he should contact you, the conference administrator.

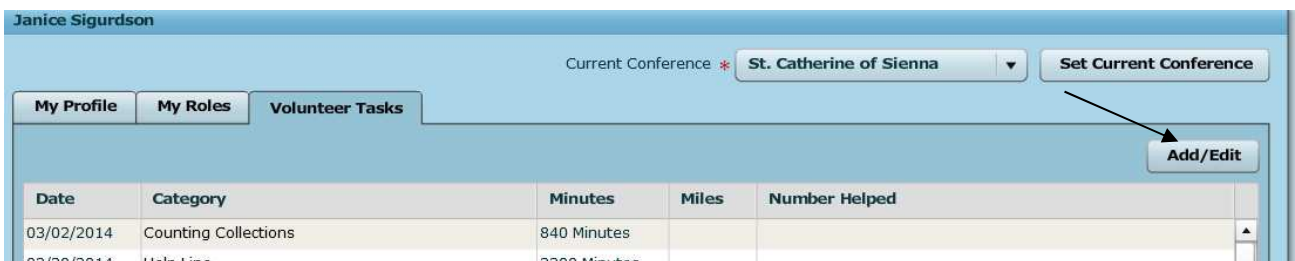


Volunteer Tasks



Very important that users log in their volunteer hours that are not spent with a client. For example, counting second collection, working in the food pantry, attending conference meetings and so forth.

Click the Add/Edit button to add or change volunteer hours.



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User changing password

If you reset a user's password, notify the user to login with his user name and the new password you created. The user may then log in and change their password to one of their choosing.

Users may also change their password at any time.

