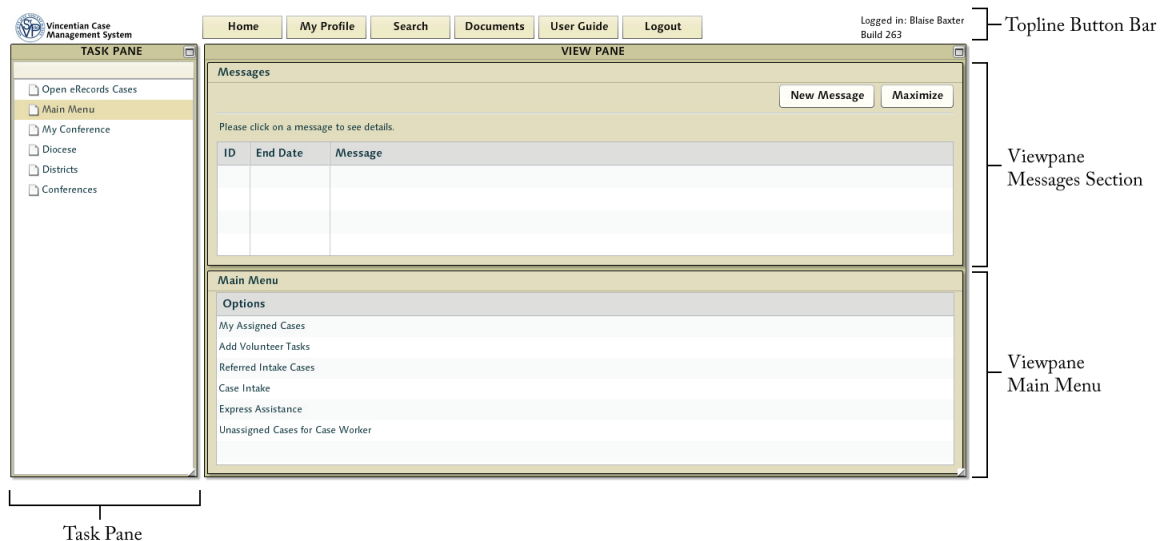




Getting Started

User Interface

The CMS user interface is an in-browser liquid display solution that uses a flash component to connect to a custom application server in flex. It is an expert server built for workflow management - with a great deal of functionality you don't often see in browser based applications. Users who are familiar with seeing applications inside web browsers that are built using other dynamic html based technologies should easily adapt to this more application-oriented user experience.



There are 3 primary navigation areas to be concerned with in the SVdP CMS system. The Topline Button Bar is a series of tabbed buttons across the top that perform some of the highest level tasks. Logging out, going back to this start view, performing a search in the system, etc. Along the left is the Task Pane - an area mainly associated with functions related to the topology of the diocese. In there you'll see information about the various conferences and districts - and see what areas they service. It is also where you will find a link to search data that's been imported from whatever older format was used prior to using this CMS system. Finally we have the View Pane - where you will find work specific to the task at hand. There will often be tabs found within the viewpane which are meant to be traversed over the course of that task - as the expert server walks you through the steps in a particular workflow model.

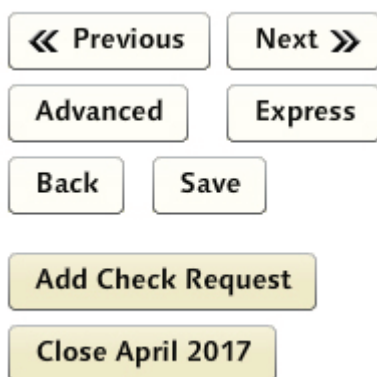
Each time the user logs into the system they will be presented with a messages pane, which displays any messages the user has been sent via the various notification events within the workflow and by other users within the system apprising the user of various activities or states. The second presented component pane is the main menu - from which the user may begin their work functions within the system itself. The options available here are intelligently filtered based on the roles assigned to the user - so only those options that the user has a right to access are available.

Getting Started FAQ

- Flash is required to use this application. All major browsers are supported, but if you are having trouble installing flash we recommend chrome (which has flash pre-installed). With regards to tablet computing - Flash is not supported on the iPad - and generally the interface for the application is not optimized for tablet computing at this time.
- Some users may be used to using the backspace key to go 'backwards' when surfing the internet - but as this is a single flash object containing the application, the backspace "back" functionality will not work. Backspace to delete text in a text box that has 'focus' works just fine - but if you're used to using 'backspace' to navigate back and forth it will not do what you expect it to.
- Rarely we update the core engine and add functionality that requires the browser object to be reloaded. When we do this (and we should always notify the diocese administrators ahead of time) it will require the user to reload the flash object by flushing the cache. This is accomplished by holding down the shift key and reloading the page.
- The flash component works with the browser's Zoom capability - so zooming the browser will enlarge the text displayed in the flash object. You may end up with vertical and horizontal scroll bars if done to extremes - but it can be done.

Navigation Basics in CMS

Many of the functions specific to the user's tasks are found as items listed out in the task pane. CMS users will see a number of buttons and tabs along the top of the section.



The most important are Next and Previous. Next is generally called for when stepping through the various states of the process - and previous provides the ability to step back through the process to change something in a previous stage.

There are many buttons that accomplish other functions - most of which are self-explanatory. Some only appear in very unique circumstances. Many times a screen might not have a feature - or the functionality might be restricted to certain roles. These will appear when appropriate for the workflow.

One slightly more complex navigational concept is important to address as well. The flash component that processes the steps of the workflow follows many of the same web application paradigm concepts as users are used to seeing. Generally, the system will do what is expected of it when you use Next and Previous for navigation. However - because these workflow level routines are also often part of a process one might wish to escape entirely - there is an additional layer of control. Think of it as nested parentheses. The caseworker

might be into the middle of entering an assistance request and simply change their mind. Previous would only step them back along the path they'd come from - whereas the 'Exit' button will escape that subroutine altogether.



Using 'exit' will escape from the currently active subprocess and take them back to wherever they were when they began. 'Revisit' will reverse this action - taking you back into the depths of whatever workflow state you've just left (giving you a chance to undo that drastic step).

System Notifications

A number of events can involve notifications to users in the system. All important notifications can be seen in the Message Pane on the main screen. In addition, many can go out by email - or alerts letting users know that things have happened in the system that should be brought to the user's attention. Whether the system sends email or not is configurable by the user - and the user supplies the email address where they want mail sent.

Agular cannot guarantee the delivery of email to every possible internet service provider and we have had trouble in the past with ISP policies with regards to system generated mailings such as these. The CMS SMTP server is configured with proper SPF Authentication and passes a reasonably rigorous test for mail authenticity. All mail will arrive as coming from CMS@cmssvdp.org.

Individuals have a great deal of granular control over which emails they wish to receive. If you do NOT want to receive mail, please remove your email address from your profile or disable the event driven email individually using the email configuration tab found using the 'My Profile' at the top instead of flagging the system messages as spam at your service provider.



Note: If you are using a by-invite only spam prevention system you'll need to manually add cms@cmssvdp.org to your list of approved senders.

Account Creation

CMS user accounts are created by administrators with the proper rights. Accounts are always instantiated with assigned roles within the system - and can be given multiple roles within the conference (and different roles in different conferences).

Newly created accounts should be given email addresses that can be used by the system to notify the user. It's not required, but if the user's email is supplied - then messages that show up in the user's current message window will also be emailed to their external mail. Many users find this useful as they are not always logged into the system. Users should make an effort to ensure the accuracy and timeliness of their email addresses.



Note: For a description of the special conference level configuration options for roles - see the Role Definition section in the Administration section of this guide.

Passwords

One of the most important and often overlooked concerns of online systems such as these is the password policy. People have been told for years to use complex passwords that are difficult to remember, often requiring at least 8 character, including numbers and symbols. However, advances in computer processing power have rendered many of these approaches vulnerable to brute force assault. Because of the nature of SVdP client information - and how private much of this data should remain shielded from exposure - it is important that users entrusted with access to this data employ a strong password. To this end we have some simple advice: use a couple common words together. A password like DancingWombatCowboy is unbelievably difficult for modern computers to break - and is much easier to remember than a shorter and more difficult to remember FddLX17\$. What you do NOT want to do is use 'princess' or your name etc. Your password can be creative - it doesn't have to be painful - but it *should* be taken seriously.



Note: We will audit passwords in the system every so often - and if your password is not sufficiently complex we'll send you a note and ask you to change it.
