User Management

Adding, removing, and managing the users within a conference is fairly simple.
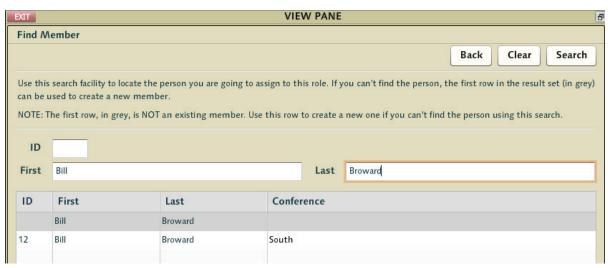
Adding a User

First we determine what level of role the account is involved with. If you're adding a conference level user, then you're going to select 'conferences' on the left and choose the conference for which the user will be added. If you're adding a district level role (such as District Treasurer) then you would select 'Districts' on the left then choose the district for which the role is to be added.

Users are unique logins with assigned roles – there is no reason for a login without an assigned role. For the most part users will be added to conferences, so navigate to the conference in question where a user is going to be added. From there select the roles tab across the top. This lets you choose what role you'll be adding to the system.

Select the appropriate role. This may seem a little counter intuitive as the idea normally would be create the user first then assign them to a role – but in this case we're more concerned with identifying the primary task they'll perform first.

This will now populate a list of all individuals within the conference that currently have this role. Selecting the Assign button will bring up a search screen – which will allow you to enter a new name (or grant the role rights to whichever user is identified by search). For example, if a person were a caseworker in another conference, they do not need a new separate login to the system – the conference administrator merely needs to find them in the system and then grant them the role rights in this conference.

Typing in a name will return a list of all existing people with that name, and a new gray one at the top (which suggests a new different account - thus allowing for multiple John Smiths to be different people with different logins to the system).

By creating a new user, the administrator fills in a number of ethnographic details related to the user. If the new account is assigned simply as a conference member, conference members do not have login rights to the system. If the account is later given a role that requires a login - then a screen for creating a login/password will be shown.

Removing a User
For many reasons the reality of removing a user is better seen as removing a user's ability to login and perform a role. Conference administrators have the right to remove a user's rights to perform a role within their conference, but the history of that user being in the system will remain intact. If the user in question is only a member of the one conference, then the user will lose their ability to login to the system altogether.

District level and Diocese level administrators have the ability to remove individuals from conference leadership roles as well. Additionally, any volunteer tasks and hours will continue to be properly tallied for the purpose of monthly and annual reporting.

It is suggested that conferences fill out their membership in the system by adding new conference members to new conferences prior to performing any other actions. This guarantees there is a basic level of information in the system at the very beginning (making sure the membership demographic data has been collected and properly input at the start).