For Administrators

Your New Conference: Getting Started

Congratulations on having your conference join the Conference Database, and thank you for stepping up to serve as the administrator for your conference.

Here is a roadmap to get you started.

STEP ONE-- Log into your new account

Follow this [Your New Account: Getting Started](#) guide to log into your new administrator account and get it configured.

Pay attention to the experience, as you will be passing that guide on to your users so they can follow in your footsteps with new user accounts that you are about to create for them!

STEP TWO-- Gather your member roster

1. Gather your current member roster. At minimum, you will need the following basic information:
    - **First** and **last** names
    - **Email** address
    - Member status: **Active** or **Associate**?
    - **Will they need to log into the database** (hopefully yes!), or just be listed on your roster as members who don't use the database?

2. For each member who will need access to the database, assign them:
    - **Username**. Choose a consistent pattern and stick to it. Common choices include:
        - FirstL (first name + last initial, capitalized as shown)
        - FLast (first initial + last name, capitalized as shown)
        - First.Last (both names, separated by a period)
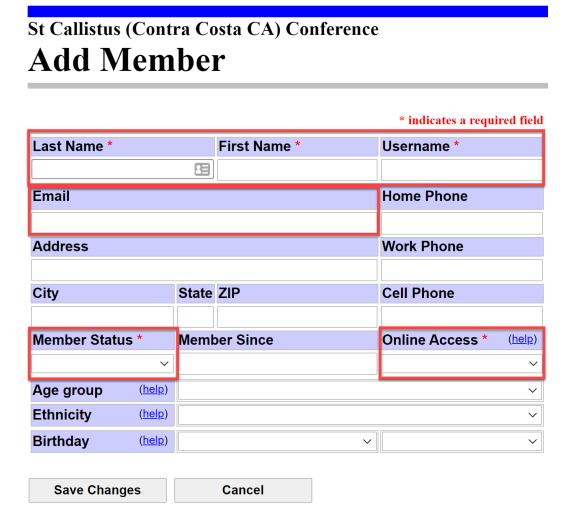   Any of these options can be a fine choice, but pick one and stick with it.
    - **Initial Password**. They will be required to change this as part of their Getting Started journey.

STEP THREE-- Add entries for each member on your roster

1. Click the **Member/Officer Directory** link on the main page.

2. Click the **Add Member** button to add a new member entry. You will get this blank profile page. At a very minimum, fill in the boxes shown in red based on information you gathered above.

St Callistus (Contra Costa CA) Conference
Add Member

* indicates a required field

Last Name *	First Name *	Username *

Email		Home Phone

Address		Work Phone

City	State	ZIP	Cell Phone

Member Status *	Member Since	Online Access * (help)

Age group (help)	
Ethnicity (help)	
Birthday (help)		

Save Changes	Cancel

NOTES:
- Remember to stick to your consistent pattern for assigning usernames: FirstL, FLast or First.Last.
- Member Status is usually **Active** or **Associate.** Available choices include:
    - **Active** for those enrolled as active members of the conference (see National Manual for definition of Active Members).
    - **Associate** for those enrolled as associate members (see National Manual for definition of Associate Members).
    - **Contributor** for those enrolled as contributing members (see National Manual for definition of Contributing Members).
    - **Inquirer** for those discerning their call to join your conference. This is intended as a temporary step that leads to active or associate if the person joins, or to inactive if they withdraw.

- ○ **Clergy** as a courtesy entry for parish clergy who will show on your member roster but not be permitted to log in.
- ○ **Staff** for employees of SVDP or of your parish who have a legitimate need to use the database.
- ○ **Inactive** is how you disable a login when someone is no longer associated with your conference. Their name will not show on your member roster and they will not be allowed to log in. You can reactivate inactives later on if they rejoin.
- ● Online Access choices:
  - ○ **None** for members who will not use the database.
  - ○ **User** for members who will use the database.
  - ○ Use **Administrator** sparingly, for 1 or 2 people who will help you run the database and support your users.

3. Press **Save Changes**. If you chose User or Administrator access you will then be asked to assign them a password.

Repeat these steps for everyone on your roster.

STEP FOUR-- Inform your Members

THIS IS REALLY IMPORTANT. Further training for users who will use the database will be *much* more valuable if your users have already done this basic account setup.

Use the email that you received as a template. Replace your username and password with theirs (obviously!).

Send them each a private email so they don't see other people's passwords.

Your email to them should contain:
1. Their assigned username and password.
2. A link to the [Your New Account: Getting Started](#) guide.
3. A request that they take action straight away to read and follow the guide. It is quick and easy, and training will make much more sense if they do this step now.
4. Let them know to contact you if they have questions.

Check up on them after a few days to see if they received your email, and have been able to follow the guide. Your call will help encourage them in case they were putting it off! Answer any questions they may have.

STEP FIVE-- Identify your Officers

1. On the main page, click **Member/Officer Directory**
2. Click **Change Officers**

3. Fill in the selections for the various offices. Since you have already created roster entries for your members (step three above) all of their usernames should be available here. Leave blank any offices that are not filled.
4. Press **Save Changes**.

TRAINING AND SUPPORT

Congratulations, your new conference database is ready for use!

To continue your journey with this new database, look to your district council for information about:

- Basic user training
- Treasurer training
- Tech support