



User Reference Manual

NOTE: This document is accessible on line from your directory by selecting Home → Help. The document will open in a new browser tab or window.

Logging In

If your directory requires you to log in to access the directory content, you will be asked to log in when you load the home page. If a log in is not required, the log in sequence is skipped. If you wish to send an email, however, you must be logged in. You can request a login by selecting Login → User Login. After a successful log in, your browser will be directed to the directory home page.

Listing All Members

From the home page, select Member Listing → List All Members on the menu bar. This will produce a spreadsheet type display of all members in alphabetical order by last name. If you hover your cursor on and select a member's name you will find that it is a link to call up the member's individual record. Also, the display of the member's email address is also a link to activate your email client program (i.e. Outlook) to send the member an email message.

Individual Search

To search for an individual member or group of members, select Member Listing → Search for Members on the menu bar to call for the Member Search form. There is a single text box for the search criteria. You may enter any number of tokens (words) into the text box separated by spaces. When you click Display Records, the server will search for all records containing all the tokens. The default is a search for individual records meeting the search criteria. (Individual Search).

Family Search

To search for all members of a family, the procedure is the same as the individual search, above, except you must select the Family Search option just below the search criteria box. The Family search option is mutually exclusive of the other options. When you click Display Records, a member meeting the search criteria is found, then all members of the member's family are found and all are displayed.

Group Search

To search for all members of a group, the procedure is the same as the individual search, above, except you must select the Group Search option just below the search criteria box. The Group Search option is mutually exclusive of the other options. When you click Display Records, all members of the group matching the group criteria are found and displayed.

List Groups

To determine what groups are defined, select Member Listing → List Groups on the menu bar. A list of the currently active groups will be displayed. If you click on one of the groups in the list, all members of that group will be displayed.

- List Staff** To list anyone in the membership designated as part of the organization staff, select the Staff menu item.
- Sending Email** To send an email, you must first be logged in. If you have not logged in, select Login → User Login on the menu bar. On the form that appears, enter your name as recorded in the directory and your password. Select the Login button and the server will check your record and log you in if the information is correct. A correct response is to return you to the directory home page. Otherwise, you will get an error message telling you what the server determined to be the problem. Once you have logged in, you may send an email to the members displayed on the screen from a search, to all members, or to the administrator(s).
- Email a Selection** To email a selection of members, perform the search you wish. This could be by searching for individuals using specific criteria or by selecting a defined group. Once the members are displayed, select Email → To These Members on the menu bar. You should be provided with the Email Page, which has a large text box. Just above the box there is a list of all the email addresses that will receive the message. You can type or cut/paste your message in the box. When your message is complete, click on the Send Email button. If you wish to abort the email process before sending, click on the Return button, which will return you to the Search Page.
- Email All Members** To send an email to all members of the directory, select Email → To All on the menu bar. Note that the words All Members are displayed above the text box. Enter your message in the text box and click on Send Email. Your message will be sent to all members of the directory. To abort the email process before sending, click on the Return button, which will send you to the Search Page.
- Email Administrator** To send a message to the administrator, select Email → To Administrator on the menu bar. Note that the words the Administrator(s) are displayed above the text box. Enter your message in the text box and click on Send Email. Your message will be sent to all members of the directory with administrator privileges. To abort the email process before sending, click on the Return button, which will send you to the Search Page.
- Change Password** You can change your password by selecting Password → Change Password. On the Change Password form, enter your name, your current password, the new password, and the new password a second time to confirm. When you click Submit, your password will be changed if you entered your name and current password correctly.
- Reset Password** You can reset your password by selecting Password → Reset Password. On the Reset Password form, enter your name and your email address. When you click Submit, your password will be changed. You will be emailed a new temporary password which you should use to log in and change your password to one of your own choosing.