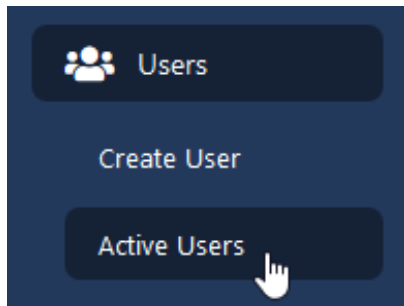


Users Menu: Active Users



1. On the left side of your screen click the **"Users"** menu
2. Click **Active Users** from the list
3. A blue **Search Users** button is located on the right side of the page. Click to view your search and filter criteria options.
4. To include users who are NOT primary users at your selected location in your search results, select the **Search Full Diocese** check box.
5. To include users who have been inactivated in your search results, select the **Include Archived Users** check box
6. Click **Apply** to view your search results

A screenshot of the 'Search Users' form. It features several input fields: Last Name, First Name, Maiden Name, Username, Email, and Phone. Below these are dropdown menus for USCCB, Certification Status, and Site. At the bottom, there are two checkboxes: 'Include Archived Users' (unchecked) and 'Search Full Diocese' (checked). The 'Search Full Diocese' checkbox and the 'Apply' button are highlighted with a red box. The 'Apply' button is also circled in green.

Viewing Search Results

Search results will show any users in the diocese who meet your search criteria.

- If you select the **Include Archived Users** check box, those results will be highlighted in red, as shown in the sample screenshot below.
- If you select the **Search Full Diocese** check box, you will have limited "Action" options for users who are not primary at your location (outlined in **blue** below).

A screenshot of the search results page. It shows a table with columns: First name, Last name, Username, USCCB Role, Certification Status, Certification Date, BG Check Date, and Actions. The second row is highlighted in red. The 'Actions' column for the second row shows a dropdown menu with 'View' and 'Favorite' options. The 'View' and 'Favorite' options are highlighted with a blue box. A large 'SAMPLE' watermark is overlaid on the table.

First name	Last name	Username	USCCB Role	Certification Status	Certification Date	BG Check Date	Actions
Test_Phoenix1	Test_Phoenix1	test_phoenix1	Volunteer	Approved	07/09/2019	07/09/2019	⌵
Test_Phoenix2	Test_Phoenix2	test_phoenix2	Employee	No	12/01/2019	Not on File	⌵
test_phoenix24	test_phoenix24	test_phoenix24	Volunteer			Not on File	⌵

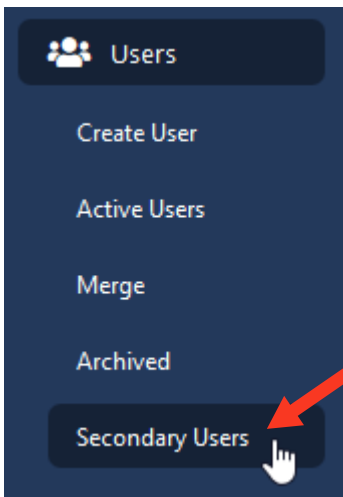
Viewing Search Results (continued)

The columns included with the User List and search results allow you to view a user's certification status at a quick glance. The individual's current status, certification date, and background check date are summarized for your convenience (outlined in green).

First name	Last name	Username	USCCB Role	Certification Status	Certification Date	BG Check Date	Actions
Test_Phoenix1	Test_Phoenix1	test_phoenix1	Volunteer	Approved	07/09/2019	07/09/2019	⌵
Test_Phoenix2	Test_Phoenix2	test_phoenix2	Employee	No	12/01/2019	Not on File	⌵
test_phoenix24	test_phoenix24	test_phoenix24	Volunteer			Not on File	⌵

Please contact CMG Connect support if you need to recover an archived user who is not primary at your location.

Users Menu: Secondary Users



The Secondary User List allows you to add users from throughout the arch/diocese who are not primary at your location to a “watch list” for easy access. This list is specific to your site administrator account.

To add an account to your Secondary User List:

- 1) Make sure to select the *Search Full Diocese* check box for your search
- 2) Click the action menu button (see **black arrow** in the image above)
- 3) Select the “Favorite” option with the yellow star icon

Any accounts that you mark as a “Favorite” will be added to your personal Secondary User List. To access the full list, click Users on the left side of your screen then choose **Secondary Users** from the menu. This list is **specific** to your own account and cannot be accessed or edited by other administrators.

NOTE: If your location has several administrators, users on this list will **NOT** automatically be updated between accounts.

To REMOVE an account from this list, repeat the same steps as above. Step 3 will now show the option “Remove From Secondary List” for the user.