**Ministerial Online Document Management System**

**Admin Guide for MCO Staff**

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**Note: This document is located on the Shared drive: MFD > Shared > MCO > Alicia Files > MCO Administrator Stuff**

# Logging In

Web Browser: DO NOT use Google Chrome or Internet Explorer/Edge. Please use Firefox: <https://www.mozilla.org/en-US/firefox/new/>

Log-in URL to access the system: <https://ministrycredentialing.uua.org/>

Type your username email address and password. Click the orange log-in button.

Marion Bell: [mbell@uua.org](mailto:mbell@uua.org) and password: ChangeMe123

# Admin – Manage Users

The Admin – Manage Users page is the first page you’ll see when you log into the system. At the top of this page, you can click the checkboxes next to Show to sort the types of users in the list below. “All” will show all of the users; “Active” will show only active users; “InActive” will show only inactive users; “Applicant” will show only current applicants; “Aspirant” will show only current aspirants; “Candidate” will show only current candidates, and so forth. After selecting your choices, click the Filter button on the right-side of the page to sort the list according to those choices.

Three buttons are at the top of the page: Download selected packets as PDF, Add new User, and Export selected Profile as CSV:

* Download selected packets as PDF: You can use the checkboxes next to user names in the list, then click the download PDF button. The PDF will begin downloading and the status is located under the Tasks tab at the top of the screen. Click Tasks and you will see the following columns: Date of creation, Task, Status, and Download. When a download is in progress, the Status column will say, “Running.” It will change to “Completed” when the packets are ready for downloading. The Download column will have a Download button you can click when it is finished.
* Add new User: This button will let you add a new user to the system. A pop-up box will open where you can fill out the user’s name, user id (recommended format is first name.last name), a generic password (such as ChangeMe123), and their contact information. A valid email address needs to be used for their account. They will have the option of changing this information after they log-in for the first time. Click “Email” next to the Notification section, and make their User Status “Applicant.” Set the Activation Status to “Active” and the Lock Status to “Unlocked.”
  + Click Save at the bottom of the form. The new user will get a confirmation email saying their account has been created, and they will be added to the User list on the main page.
* Export selected Profile as CSV: This button will export a copy of a user’s profile to your computer in an Excel document. You can click the checkboxes for as many users as you would like to export. Access the downloaded file by clicking the Tasks button at the top of the page.

The default number of users in the list is 10, but you can change that by clicking the down arrow next to Number of users per page.

You can sort the User list by clicking the down arrows next to First Name, Last Name, or Email.

Each user has an Action column where you can view their Profile or Packet and an Action column where you can delete a user from the system. **NOTE: When you click “Packet,” you will be able to edit their packet materials AS IF you were the user. That means that the user themselves WILL NOT be able to access their account when you are looking at their materials. You will need to navigate back to the Admin Home page to get out of their account.**

A search bar is located at the top right-side of the page. You can type user names to locate a specific person.

NOTE: If you need to delete a user from the system, you MUST email Mark Steinwinter at [msteinwinter@uua.org](mailto:msteinwinter@uua.org) with the person’s email address and name. The system will show you an error message if you try to re-add the person; Mark needs to delete the person in the background.

# Admin – Manage Admins

Six tabs are at the top of the screen. The tab next to Users is the Admins tab. This is where you can manage the administrators of the system. New admins can be added at the top by clicking the “Add new admin” button. You can also view admin profiles under the Access column or delete an admin from the system under the Action column.

NOTE: If you need to delete an admin from the system, you MUST email Mark Steinwinter at [msteinwinter@uua.org](mailto:msteinwinter@uua.org) with the person’s email address and name. The system will show you an error message if you try to re-add the person; Mark needs to delete the person in the background.

Your profile is located underneath your name on the right-side of the screen. From the drop-down menu, you can access your Profile, Logout, or return to the Admin Home screen.

# Admin – Tasks

As discussed above, the Tasks tab is where you’ll access information you’ve downloaded.

# Admin – Manage Forms

This page is where all of the forms for the ministerial process are kept. The list is sorted by ID number by default, but you can change the sorting by clicking the down arrows next to Form Title/File Name or Uploaded Date.

The Action column has four icons:

* Pencil: Click the pencil to edit the form’s title.
* Upload Arrow: Click the arrow icon to replace an already existing form. A pop-up box will ask you if you are sure you want to replace the form,
* Eye: Click the eye to view the form. A pop-up box will open showing you what the form looks like. Click outside of the box to exit the view field.
* Trashcan: The trashcan icon will delete the form. You can only delete forms if they are not connected to a specific requirement. Information about requirements is outlined below.

Click the Add New button at the top of the page to add a new form. The form will be added to the bottom of the list. **NOTE: Forms will automatically update in the system after a change is made.**

# Deleting Forms and Linking Forms to Requirements

There is a form labeled None at the bottom of the list. Do not delete this form. The forms are linked to the appropriate requirements that the user will access when they are working in the system. You can only delete a form if it is not connected to a requirement. Access the Manage Requirements section, click the Edit button underneath the requirement you want to remove a form from, then click the Display Download button. The drop-down list will show every form including the form labeled None. Click None and then uncheck the Display Download button. Navigate to the Manage Forms section again and delete the form you want to remove from the list. This is a workaround for this issue that ITS discovered in the system. ITS will find a solution to deleting forms in the future.

# Admin – Manage Requirements

This is where universal changes will be made to the online system for all users. You only need to create a new copy of the requirements if you want to change specific language or re-order the requirements that users will see when they access the system.

Click Make a New Test copy at the top of the page.

You will notice an exact replica of the requirements that users will see when they access the system. The Applicant Requirements are listed at the top of the screen, labeled 1 through 7, which corresponds to the current requirements for achieving Aspirant status. Clicking on a form’s title will show a few options: Edit, Delete, Move, Insert new above, or Insert new below:

* Edit: Clicking edit opens a pop-up box that will let you change the form’s title, add an N/A checkbox, add a Download button, OR add instructional text. **NOTE: Every form should have some instructional text even if it is one sentence long.**
* Delete: Clicking delete will delete the requirement in the list; if you delete an item, the list will renumber itself.
* Move: Clicking move will change the order of the requirements in the list.
* Insert new above or below: Clicking these buttons will add a new requirement line either above or below the requirement you are reviewing.

When you are finished editing the requirements, click the “Save Changes for All Users” button at the top of the page.

You also have the option to “Discard Test copy and All Changes,” “Save Changes for New Users Only,” or “Undo Last Change.”

# Admin – Manage Notifications

This page lets you designate an email address for when a user completes a section. Right now, they are set to the [mco@uua.org](mailto:mco@uua.org) email address. Notifications can be sent to multiple email address separated by a comma. Click Save at the bottom of the page.

# Notification Emails

You will receive a notification email whenever a user completes a section (Applicant, Aspirant, and Candidate). When they complete a section, you will log-in to your Admin account and review their submitted materials. You can contact the user if they need to resubmit a document.

# Changing a User’s Status

After a section is complete, you will update their Status to move them along the ministerial credentialing process. When they complete a section, their status automatically becomes locked. Access the user’s Profile and scroll to the bottom of the page. Change the User Status to “Aspirant” or “Candidate” depending on what section the user completed. Click “Active” next to Activation Status and “Unlocked” next to Lock Status.

When a candidate finishes the paperwork for their MFC packet, change the User Status to “Interview” and the Lock Status to “Locked.” You can also set the user status to “Fellowshipped,” “Returning,” or “Disqualified.”

# Additional Information

Googledoc for making comments, asking questions, and resolving issues: <https://docs.google.com/spreadsheets/d/1GBdp9IqksoI0Eqfa3hzI3n_4HQM0XBK2nXuyrFiUmBU/edit?usp=sharing>

Marion Bell is the owner of the Googledoc. Mark Steinwinter has a link to this Googledoc.

The user guide for applicants, aspirants, and candidates is located on the S drive: MFD > Shared > MCO > 8. Website Documents > Requirements handbook and appendix > NEW VERSION FOR ONLINE SYSTEM > mfc online system\_user guide. The guide is in Word right now, but will be added to Drupal as a PDF.