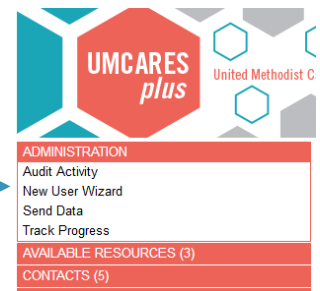


Using the Wizard to Create a New User

From the left menu panel, under Administration, choose **New User Wizard**



1. User Type: choose **“Track Based User with Track and Mentor Options”**. The “Administrative User” is for DCOM members and others who would not be assigned to a track. The conference office will manage these user accounts. Click Next
2. Name: enter the personal information for the new user. **A first and last name along with email address are required.** Click Next
3. Review the Similar Matches listing that appears on the right. These are other users with a similar name or email. Their birthdate, conference, and user role are listed to help identify possible duplicate accounts. If you believe the candidate you are entering is a match for a candidate already in the system, Cancel out of the Wizard and contact ClergyExcellence@vaumc.org so that verification can be made.
4. Staying on this page, confirm the Access Level is defaulted to **“Individual”**. Using the dropdown options next to **Title Role: choose Candidate (GBHEM)**. *You may be tempted to choose Certified Candidate (System) however this is not the correct role.* The certified candidate role applies to someone already certified who may be transferring from another conference. Click Next
5. Location: defaults should be set appropriately for Southeastern, Virginia, and your district. You do not need to select a church for new candidates; **leave church as Unknown**. Click Next
6. Tracks: you will assign your new candidate to **two tracks** which they will work simultaneously. Using the dropdown options, choose **“Inquiring Candidate”**; then click the button for Another Track. The dropdown box will reset and the track you selected will appear beneath. Using the dropdown options, choose **“Candidacy Summit Event”**. Click Next
7. The Location information will appear again, with two Mentor options beneath. Click Next. If a mentor is required... Using the dropdown options, choose **“Crystal Sygeel”** as the Mentor. Choose **“Home”** as the Mentor Type. *As an inquiring candidate, your new user is not yet paired with a mentor group so no other name is appropriate.*
8. Review and verify the information you have entered. Your page should look similar to the below:

New User Wizard

Choice > Name > Security > Location > Tracks > Mentors > Verify

Name:	Francis Asbury
Email:	FrancisAsbury@gmail.com
Location:	Southeastern, Virginia, Richmond
Church:	Unknown
Main Role:	Candidate
Access Level:	Individual
Track(s) Selected:	Candidacy Summit Event (Virginia), Inquiring Candidate (Virginia)
Mentor(s) Selected:	Lindsey Baynham (Home)
Invite User On Save	<input checked="" type="checkbox"/> Virginia Candidate Invitation (Virginia)

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9. Invite User on Save: should be checked. Using the dropdown options, choose **“Virginia Candidate Invitation”**. Leaving the system user invitation in the dropdown will send a generic invitation.

Save and Return to Home Screen: will send you back to the home page after saving and inviting the new candidate. The other save options will redirect you to either create another new user or to the personal information of the user you just created. We recommend that you leave the user’s profile blank and they will complete it when they register.