

Introduction for all users

1. **Before you begin:** This system displays information on <https://ofsusadb.org> and on <https://c7cre397.caspio.com>. When you 1st use the system you need to ensure the program you use on your computer is setup to accept the information. CASPIO has provided instructions here. <https://howto.caspio.com/system-requirements/>. If you use a web browser which tries to protect you privacy you must allow additional exceptions to this protection. In the case of Firefox, you need to also on the Applications->Security & Privacy screen, scroll down and add an exception to allow cookies from <https://c7cre397.caspio.com>. Chrome and Edge don't provide the added privacy protection so you don't have to make this kind of adjustment.

2. Definitions

- a. **Organization vs. User vs. Person:** An organization is an entity that is recorded in the system (e.g., Region, Fraternity, Friar Province). A user is an individual who is given access to the system. A person is a real individual whose information is recorded in the system. Persons exist in an organization (e.g., Fraternity, Friar Province) but they can be officers in more than one organization (e.g., Region, Fraternity Council).
- b. **Kinds of users:** Users are people who interact with the system. They fall into one of three types.
 - i. **Basic User:** these users are restricted to the tasks they can perform. Users who will edit a Fraternity or a Province would normally be assigned to this level. The general tasks they can perform are listed at the left of the page. Tasks specific to an organization will appear on the right side of an organization's summary pages.
 - ii. **Admin user:** these users are trusted with tasks which require following special rules. Normally there will be at least one for each region. The additional tasks will also appear on the right.
 - iii. **Super Admin user:** these users are trusted with system level tasks *in addition to* normal Admin tasks. These tasks will appear as 'System Functions' on the left of many pages. They primarily involve the creation of and editing of all kinds of users and assigning access (see below). They also qualify persons who must meet certain criteria (e.g., knowing that a person has met the criteria to be assigned as a Spiritual Assistant or assigning to a user the permissions to view or edit information about an organization and or persons assigned to that organization).
- c. **Types of Organizations.** The type of an organization determines what information is available about that organization as well as actions within the organization (see below). Additionally individual organizations can be either active or inactive. Organizations exist in a hierarchy (e.g., OFS-USA, Region, Fraternity). Examples of organizations include:
 - i. Secular Franciscan: OFS-USA, Regions, Fraternities, Newly Forming Groups, Emerging Fraternities, and Cells)
 - ii. Organizations under CIOFS: The National Fraternities, including OFS-USA
 - iii. Religious Orders: OFM, OFM Conv., OFM Cap., TOR, and their provinces, as well as other religious orders involved with the OFS.
 - iv. USCCB (e.g., Diocese)
 - v. Other entities (e.g., Franciscans Intl., Franciscan Resources)

d. **Positions.**

- i. Different positions are available to each type of organization. If policy changes and a position is no longer needed, a position will be hidden (*not deleted*) so new people cannot be assigned to it but the historical record of its existence is retained. Within an organization, certain positions can be unique (e.g., there is only one Minister in a Fraternity) or not (e.g., there can be several councilors on a Fraternity Council). Positions can have an extra description added to them as the organization desires (e.g., Councilor for Northeast Area of a region would be a Councilor with a description of 'Northeast Area'). This allows vacant positions to be filled easily without having to deal with a bunch of different names for the same basic positions. Normally a person must be a member of an organization to be assigned to it. Certain Positions can only be fulfilled by *professed* members of that organization.
 - ii. Spiritual Assistants can be assigned only if the person has been marked as 'Qualified' first. Any person qualified can be assigned to any Spiritual Assistant Position after the paperwork and approval process is complete. For this reason only **Super Admins** can mark a person as qualified after a suitable organization has certified that they have completed the training, and only an **Admin** can assign a qualified person as a Spiritual Assistant.
- e. **Access and Permissions:** each user, no matter the type, can be granted permission to individual organizations. For a given organization, this permission can either be to view information (i.e., **Read** access) or to both view and change information (i.e., **Edit** access). A person with Read access can see information about the organization including what persons hold offices in that organization, but they will have limited access to individuals holding those offices. For example, a regional **Admin** user will probably be given **Read** access to the National Fraternity organization so they can see who holds certain positions, but they would not have access to personally identifiable information about that person. When they view the list of Regions, only the Region(s) they can Read or Edit will display the Summary Link to that organization.