CMGConnect

Diocese of St Cloud — Safe Environment Program
Site Administrator Guide

Welcome to CMG Connect!

This guide is your first step to preparing yourself as a resource for the individuals at your site(s) who will be completing training. Review this document when you are beginning your role as a new administrator and keep it on hand for when you have "how-to" questions about the system.

If you can't find the answer to your questions in this document, the CMG Connect team is ready to help you at cmgconnect@catholicmutual.org.

Access CMG Connect at your custom link:
https://StCloud.CMGConnect.org

Note: Internet Explorer 11 is NOT supported at this time. Please use Google Chrome, FireFox, Microsoft Edge, or Apple Safari.

CATHOLIC MUTUAL GROUP

Questions? Contact us at
cmgconnect@catholicmutual.org

Last Updated: 07/11/2023

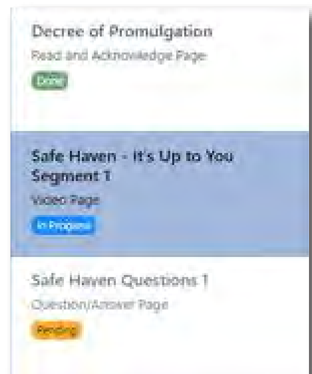
General Information: Definitions

Defining a universal set of terms will help us to help you! Please familiarize yourself with the terms below as they will be used throughout the guide.

User: Any person who is accessing the CMG Connect training platform; an end-user refers to non-administrative individuals

Site: The location/school/parish/organization to which a user is affiliated. Users can only select one site as their primary location.

Curriculum: (*right*) Any individual module that appears under the Required Training or Optional Training Curriculum areas on a user's training Dashboard. Each curriculum is made up of different pages.

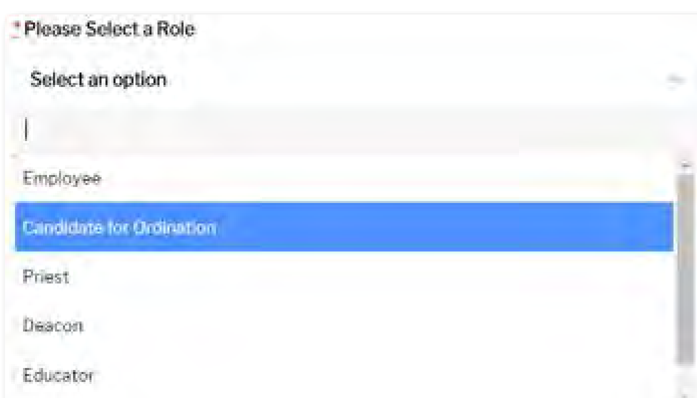


Curriculum page: (*right*) components of a training that make up a curriculum. Pages will reflect the progress of your training. If it is grayed, you do not have access to that page yet and need to complete the page before.

Please note that video training pages require watching the entire video before progressing to the next page. If you leave the training at any time during the video, it will restart.

Certification (Status): *(below, left)* certification status signifies whether or not a user has completed the components required by your organization for Safe Environment compliance: training (online or live), acknowledgment of policies, and a current background check/screening.

USCCB Role: *(below, right)* Referred to simply as "Role" at account registration, users select from these 6 major categories: *Employee; Candidate for Ordination (Seminarian or Deacon Candidate); Priest; Deacon; Educator (Catholic School Teacher or Principal ONLY); and Volunteer*. These are used by the United States Conference of Catholic Bishops to define individuals who are Safe Environment certified.



General Information: Certification Status Definitions

User has met all Safe Environment requirements for the Diocese. *(Training + Background Screening/Fingerprint)*	Yes
User has met all Vulnerable Adults requirements for the Diocese. *(Training + Background Screening)*	Yes (Vulnerable Adults)
User has met all Safe Environment requirements for the Diocese, but is **NOT** permitted to drive children and/or vulnerable adults.	Yes (No Driving)
User's profile is currently under review *(Ex: User is missing training, background check had hits that are under review by the Diocese, etc.).*	Under Review
User has completed the background check but has not finished the training.	BG Only
User completed Safe Environment training, but has NOT fulfilled background check requirement. *Check Notes on the entry for more information.*	Training Only
User is **NOT** approved to work with children and/or vulnerable adults.	No
User's training and/or background check is expired. *Accuracy of dates will vary based on data entry by Diocese Admin.*	Expired

General Information: Responsibilities

As a Site Administrator for the Diocese you are responsible for key functions in the process of making sure a safe environment is being maintained for the safety of your children and young adults. Thank you for your willingness to accept this responsibility of managing training and certification for your site(s).

Site Administrator Responsibilities

• If needed, complete Safe Environment curriculum (including background check submission) via the CMG Connect training platform. Log in with your Site Admin account at https://stcloud.cmgconnect.org.

• Ensure that communication is sent to users who are nearing expiration for background checks and/or safe environment certification

• Manage user profiles and assist end users with questions

Diocese Admin Responsibilities

• Review background checks via the CMG Connect dashboard

• Assign Certification Statuses to users after reviewing background checks and confirming completion of training requirements

• Assist Safe Environment Site Administrators with learning and utilizing CMG Connect as well as addressing direct questions from end users

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The Diocese requires safe environment training, policy acknowledgement, and background check submission every **5 years**.

Full Training includes online *Safe Haven - It's Up to You* videos & questions, Diocese policy acknowledgment, and background check submission.

End-users will be notified via email (and system inbox) 60 days before their Certification Status expiration date for recertification.

For technical assistance, please refer to the blue Support Tab at the bottom of your screen.

CONTACT INFORMATION

For questions specific to the requirements, policies, and/or guidelines of the Diocese of St Cloud, please contact:

Linda Kaiser (Director)
lkaiser@gw.stcdio.org
320.251.2340

Bailey Ziegler (Tech Support)
bziegler@gw.stcdio.org
320.258.7655

Or visit the Diocese Safe Environment web page for more details:
http://stcdio.org/safe-environment/

For questions about your administrative account OR if you have end-users who need help with account access and technical questions, please submit a ticket via the Support button on the website, or contact our customer support number: (833) 993-1667

CMG CONNECT SUPPORT HOURS:

Monday-Thursday
6:30AM – 5:00PM (CST)

Friday
6:30AM – 12:00PM (CST)

Our team will respond to support requests received outside of regular hours as quickly as possible on the following business day. Thank you for your patience and understanding!

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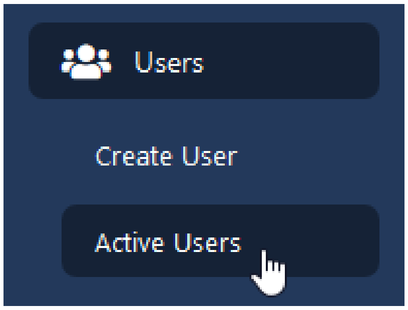
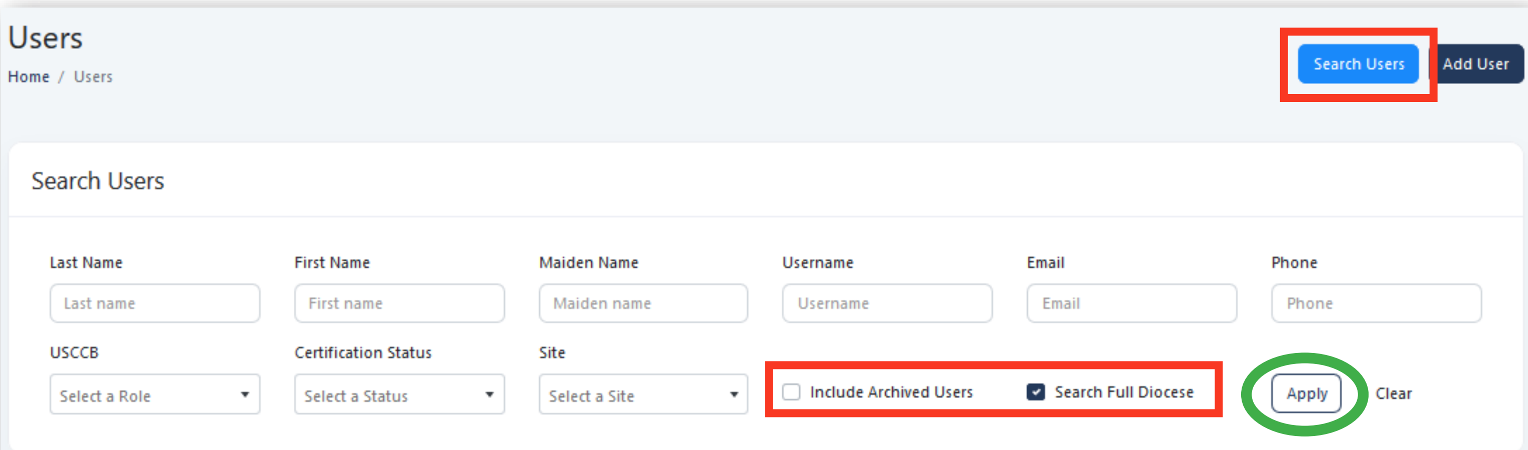
Users Menu: Active Users



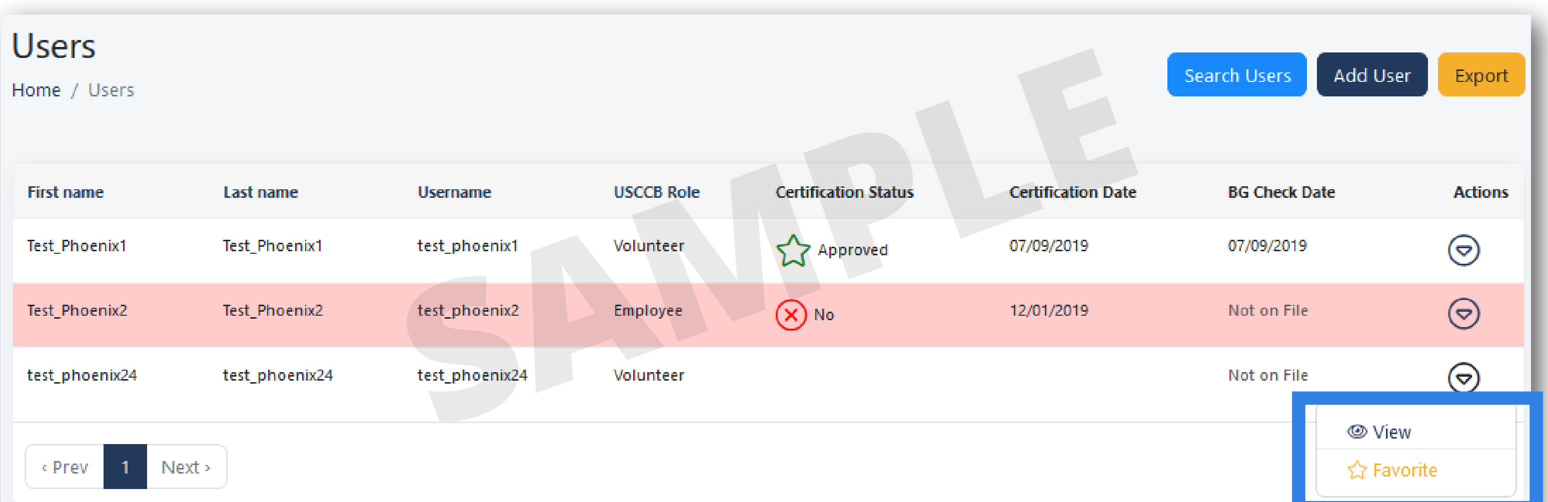
1. On the left side of your screen click the **"Users"** menu
2. Click **Active Users** from the list
3. A blue **Search Users** button is located on the right side of the page. Click to view your search and filter criteria options.
4. To include users who are NOT primary users at your selected location 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



Viewing Search Results

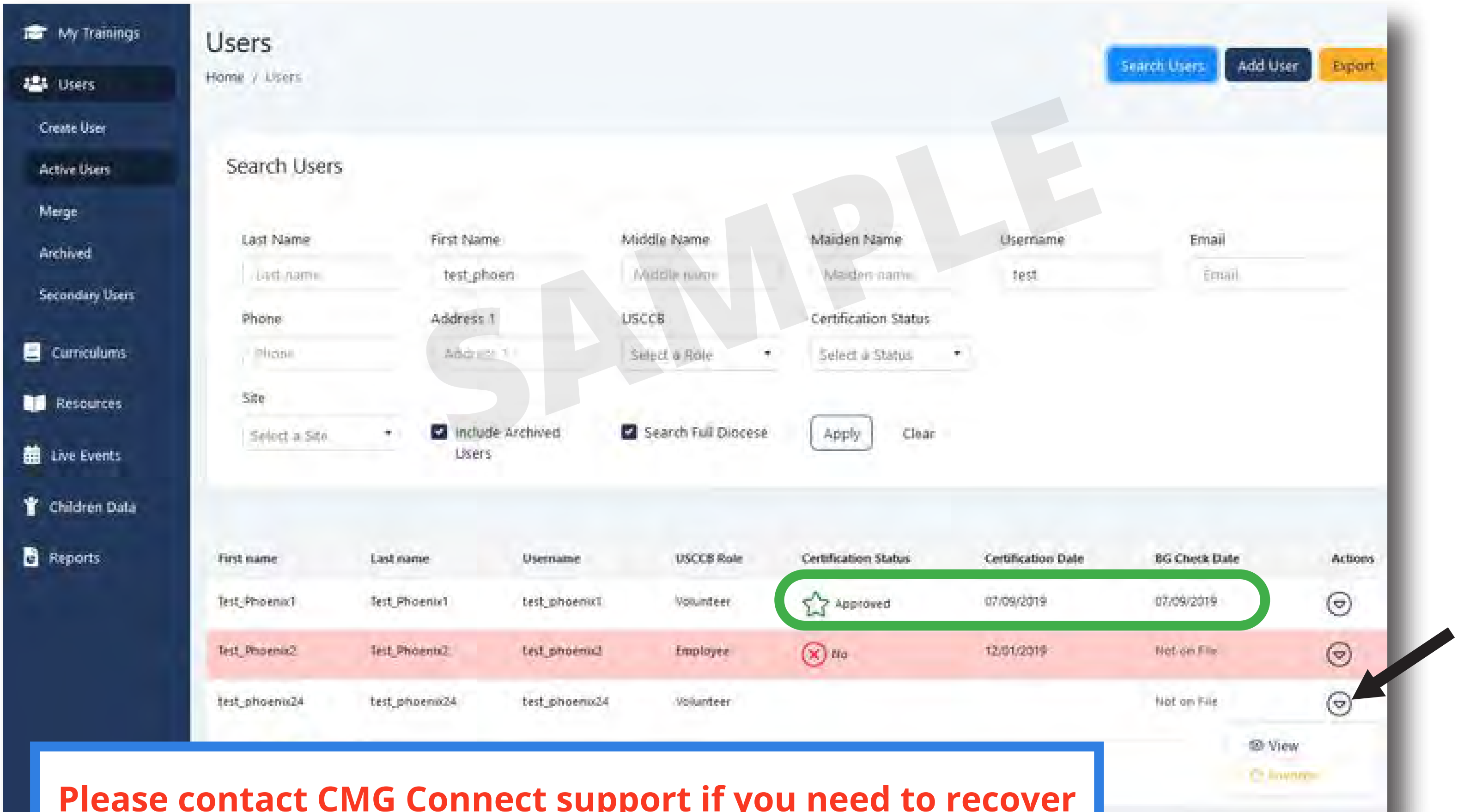
Search results will show any users in the diocese who meet your search criteria.

- 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).



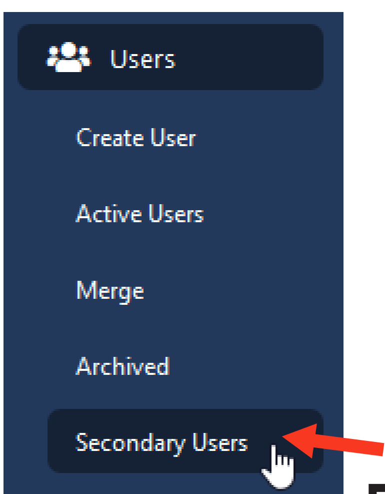
Viewing Search Results (continued)

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**).



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. The list is specific to your site administrator account.

To add an account to your Secondary User List:

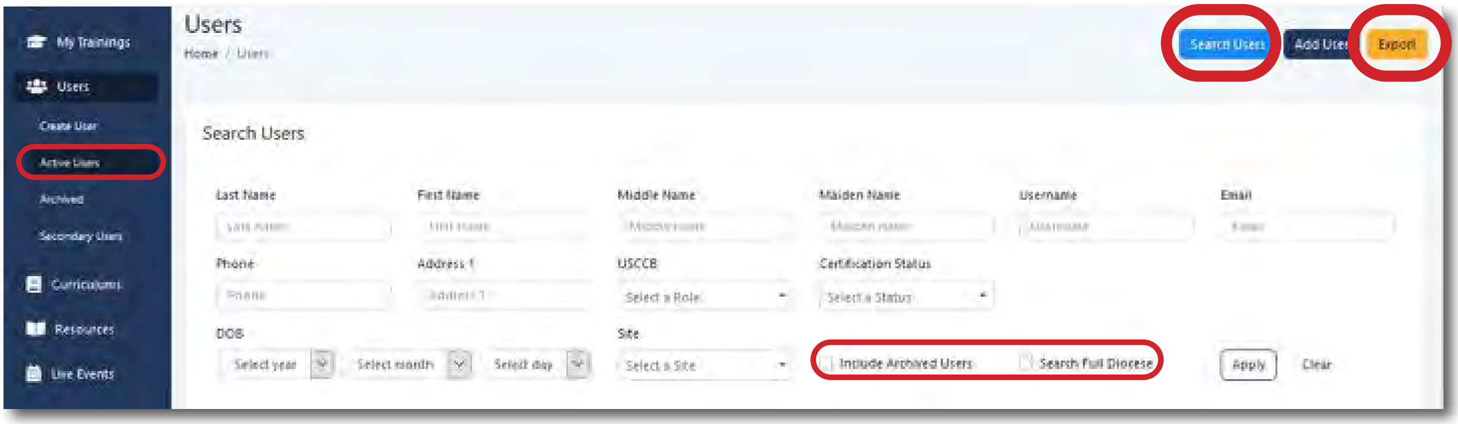
1) Make sure to select the *Search Full Diocese* check box for your search
2) Click the action menu button (see **black arrow** in the image above)
3) Select the "Favorite" option with the yellow star icon

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.

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.

Users Tab: Active Users

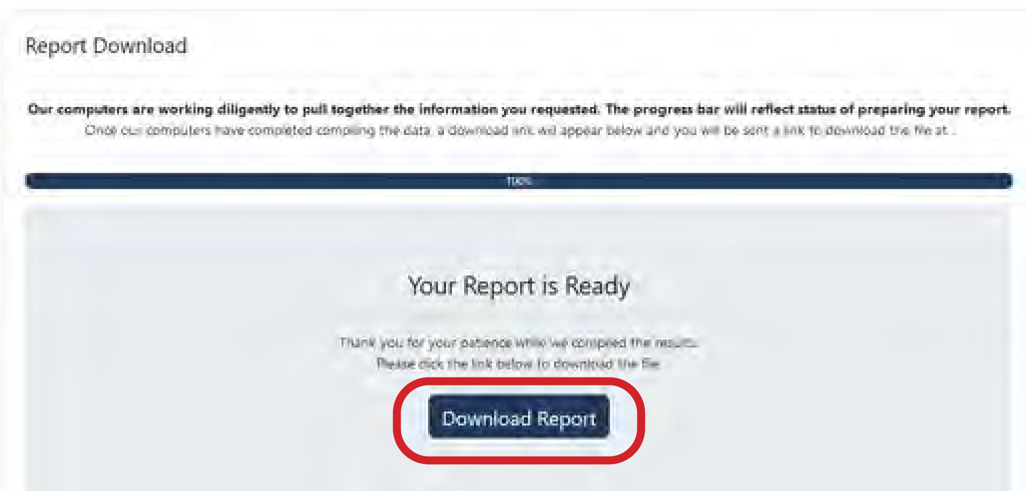
Search Users & Export Features



Use any of our variety of search criteria to look up user accounts. Mix and match how you use the different fields to filter your results to the specific user or user groups you want to view:

- Last, First, Middle, or Maiden Name
- Username
- Email address *(must be entered as "@__.com")*
- Phone Number
- Address
- Certification Status
- USCCB Role
- Date of Birth

You are also able to include archived/inactive users and users throughout the entire Arch/Diocese by selecting the check box(es) before clicking "Apply" to run your search.



Clicking the Export button will pull your user list into an Excel .csv spreadsheet. Once it downloads you will have the ability to open this report and view. If your email is in the system you will also receive a message and a download link.

Note: This report will pull first name, middle name, last name, username, email, USCCB role, parish name, parish city, certification status, certification date, background check date, background check type, when the account was created, and the last user login.

Last Updated: 07/11/2023

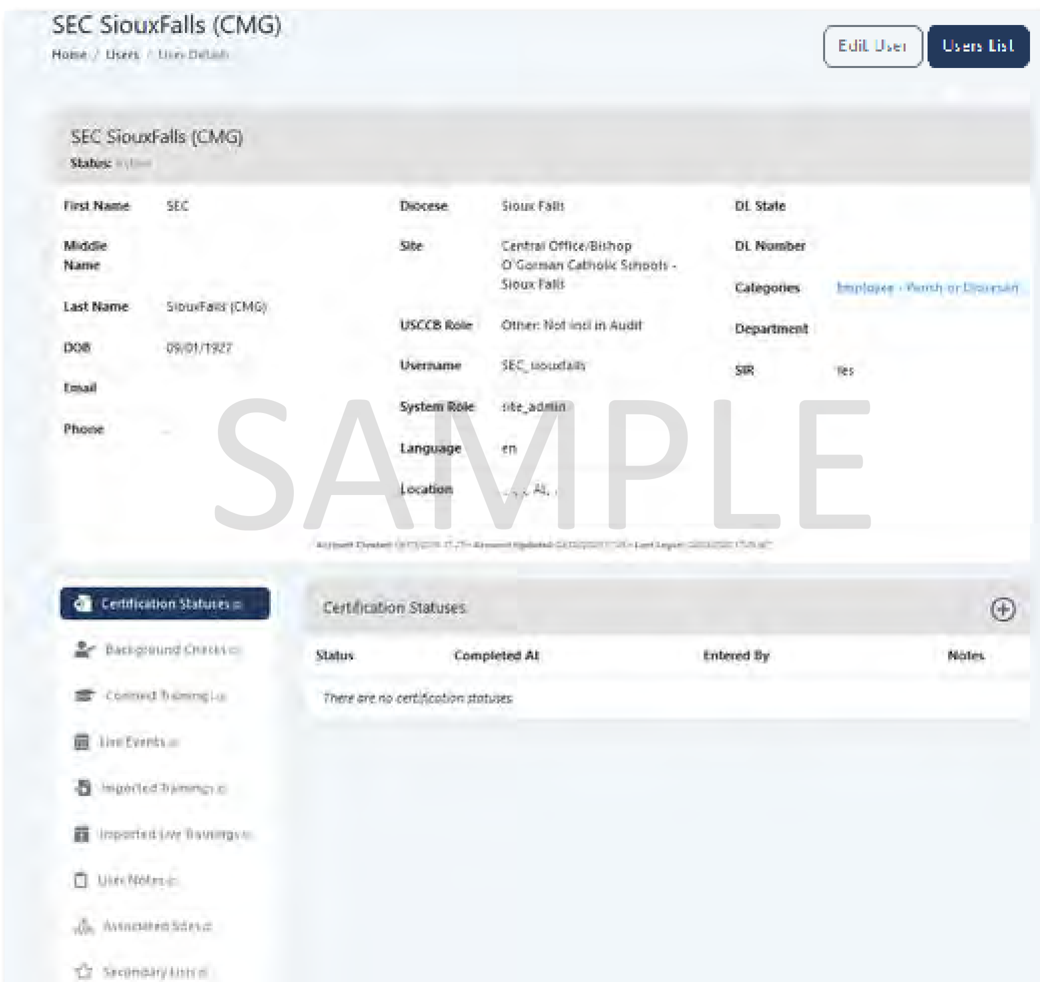
Users Tab: Active Users

View Users

The "View" page allows you to see a user's overall account activity and training history.

1) Click the **Users** tab on the left side of your screen
2) Select **Active Users** from the list. *If needed, use the "Search" tool to locate a specific user.*
3) When you have located the user you want to view, select the “Actions” menu arrow
4) Select **View** from the drop-down

The User Profile page is split into demographic information at the top and all training data, background check/fingerprint records, imported training, and notes at the bottom.

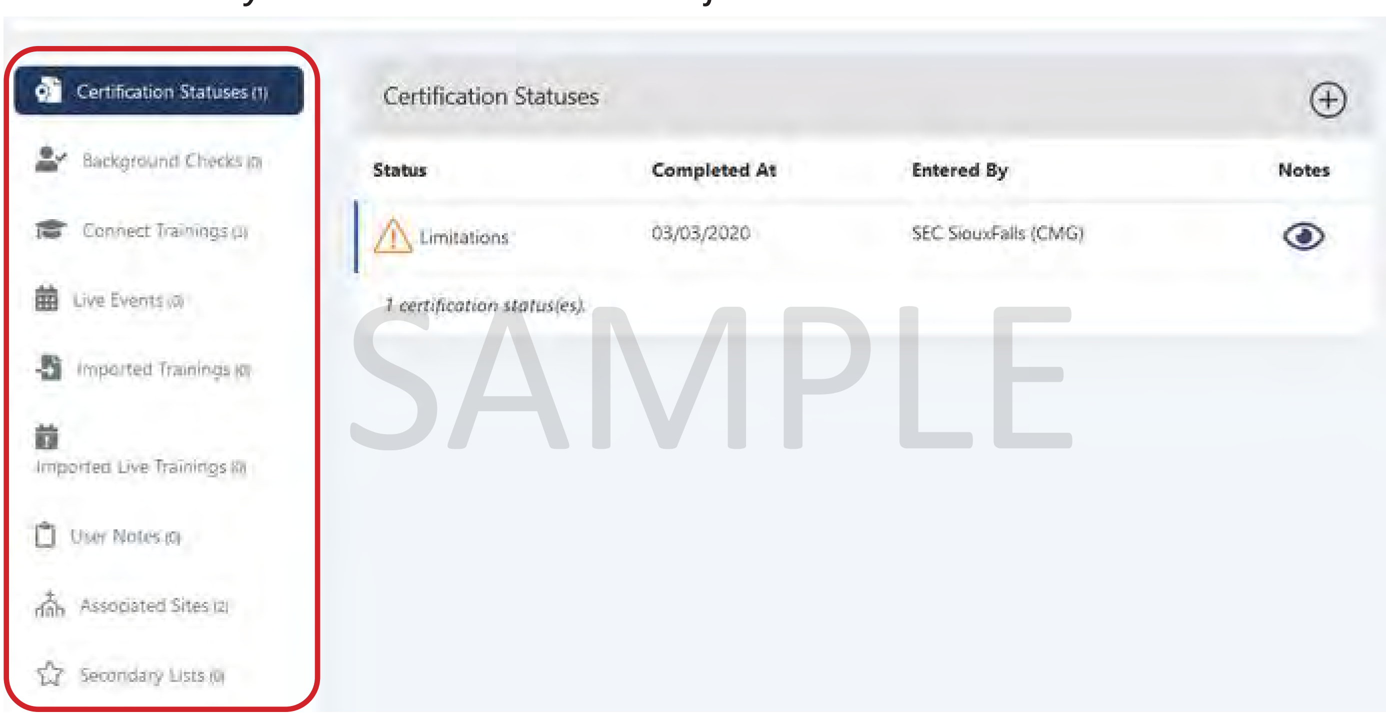


In addition to the demographic information on the account, the top section of this page also displays when the account was created, updated, and the last login.

You can toggle between the **Edit** and **View** pages at the top of the page if their account is listed as a primary user at your location.

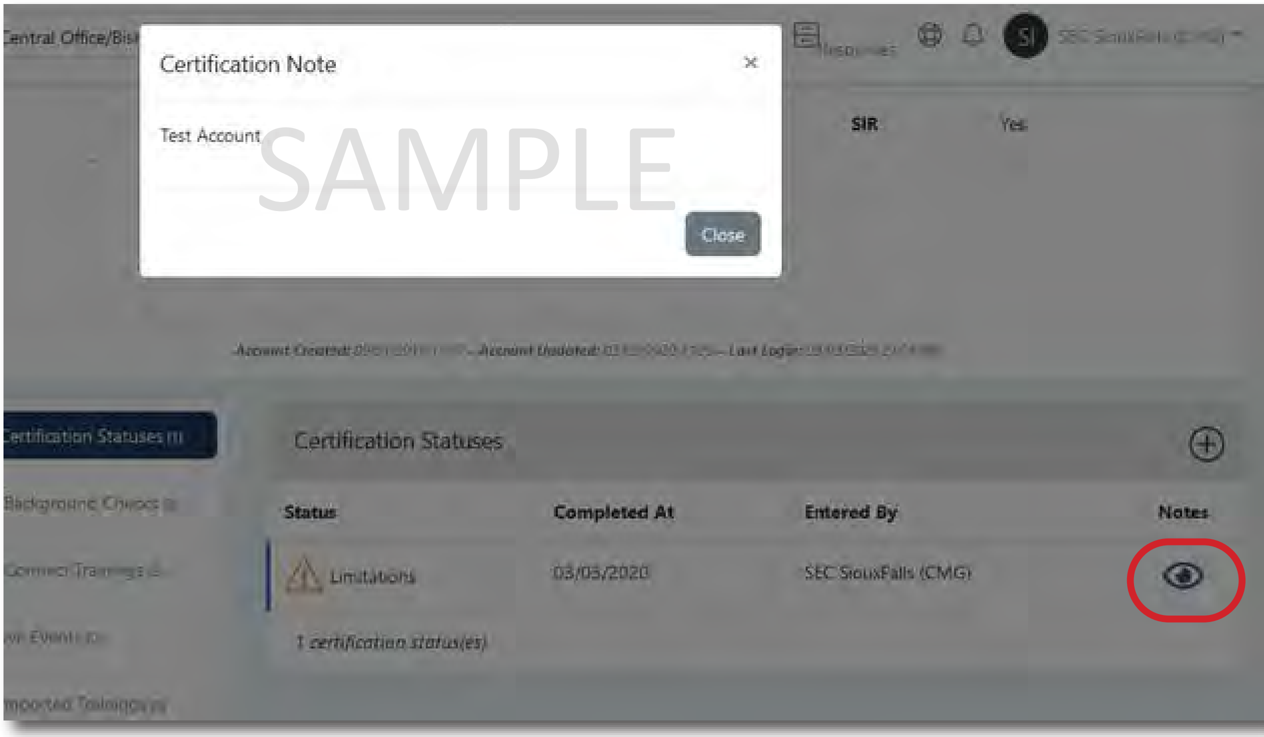
The bottom half of the User Profile will allow you to click on each of the areas to see certification status, background check dates, training information, historical training, user notes, associated sites and what secondary user lists that this individual is on.

Note: You will only see the Associated Sites area if the user is also a site administrator.

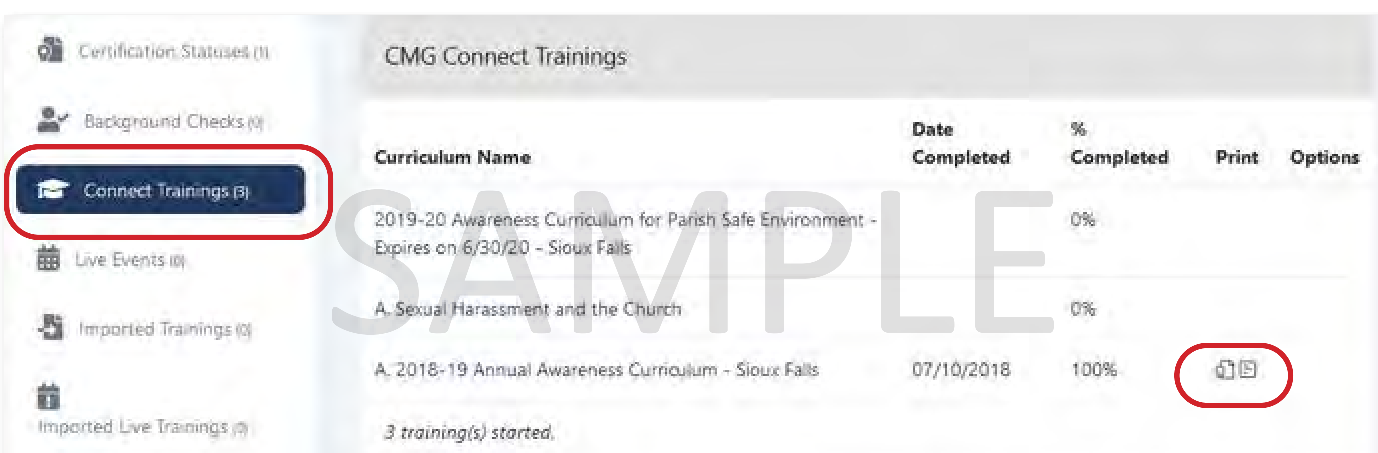


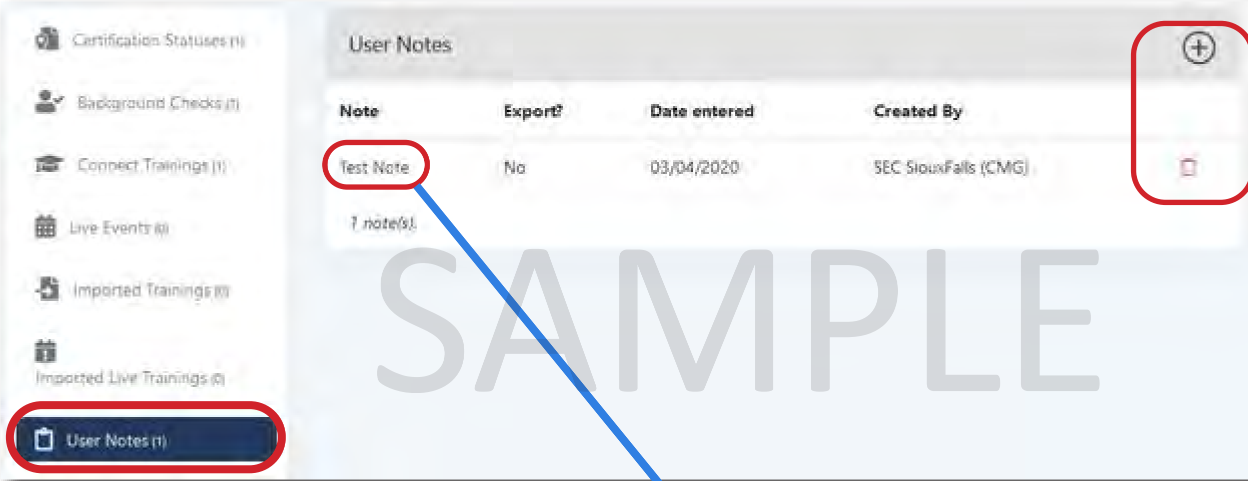
If there is an eyeball icon under the "Notes" section of an entry, click to view any notes that have been entered by an administrator regarding the record.

If you have questions about a Certification Status or need clarification on a user's Safe Environment clearance, please contact the arch/diocesan office for assistance.

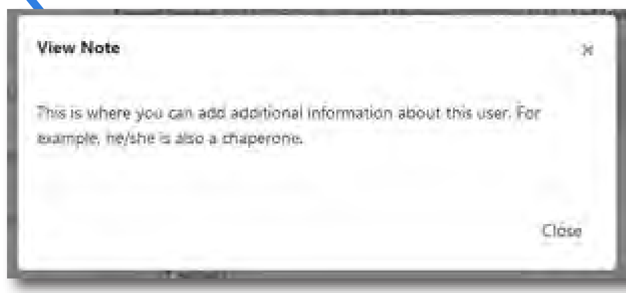


From the **Connect Trainings** section of the page, you can view records of completed and/or started curriculums. If a user has completed a training, you have the ability to print certificates and view the responses to questions within that curriculum.





The **User Notes** area allows administrators to add information to a user's account for other administrators to view. Be sure to include the Note Title when creating your entry as the title is what hyperlinks to view the note.



These notes can be added/removed at any time. Please note that while users can have as many notes as needed, only ONE user note can be Exported via the Export Builder tool.

The **Secondary Lists** area show other locations (if any) that the user has been marked as a secondary list and which admin for that site starred their account. There may be several entries if the user is affiliated with multiple parishes or schools.

Last Updated: 07/11/2023

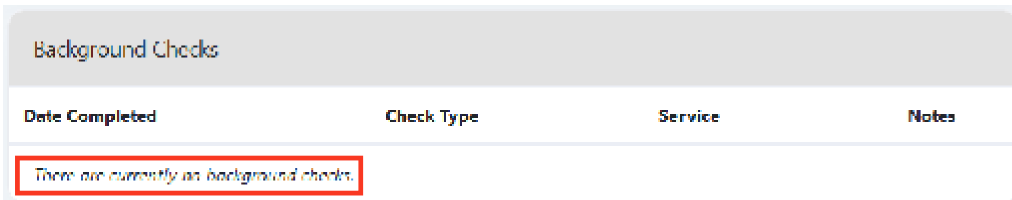
Users: Tips to Reading the Background Check Section

These tips will help you understand what to look for in the "Background Check" section to confirm if a user's background check has been submitted successfully or if additional action(s) are needed.

1) Click the **Users** tab on the left side of your screen
2) Select **Active Users** from the list. *Use the "Search" tool to locate a specific user.*
3) Choose **View** from the "Actions" menu drop-down
4) Scroll down and click the **Background Checks** section

NO RECORDS: *Background Check request has NOT been submitted for processing*

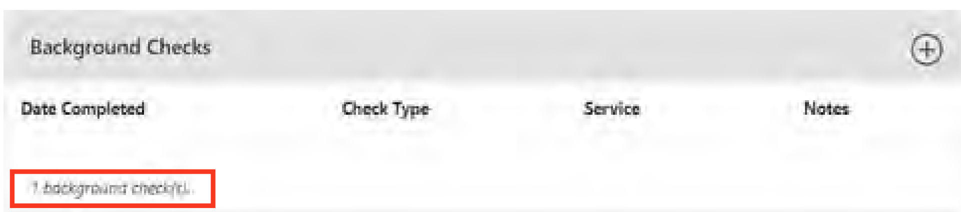
If there are no background checks listed, *regardless of a user's curriculum percentage*, it means the user did not complete the last step of actually submitting their background check details.



User Steps: **1)** Log back in to their CMG Connect account, **2)** Click "Resume" to return to the background check page within the curriculum, **3)** Click "Submit Background Check Request" at the bottom of the page. A summary page will load confirming their submission attempt. *Processing can take up to 7-10 business days from the time of submission. The user's curriculum will remain marked as "Resume" until the results are complete.*

BLANK RECORD: *Background Check is PENDING submission (Live Training or Payment)*

A blank record as shown below can mean different things depending on your organization's settings.



If utilizing the Live Events feature: A blank record indicates that a user completed their full curriculum (including the background check submission form) but attendance has not yet been confirmed by an administrator.

User Steps: NONE. The user's submission request will be sent for processing when an administrator confirms their RSVP via the Live Events function of CMG Connect.

If utilizing the Self-Pay feature: A blank record indicates that a user completed their full curriculum (including the background check submission form) but has not provided their payment information for the request to be processed.

User Steps: **1)** Log back in to their CMG Connect account, **2)** Click "Resume" to return to the CC payment page **3)** Enter Credit or Debit card information, **4)** Click the blue "Pay" button. A summary page will load confirming their submission attempt. *Processing can take up to 7-10 business days from the time of submission. The user's curriculum will remain marked as "Resume" until the results are complete.*

If NOT using Live Events or Self-Pay: A blank record indicates that a user completed their full curriculum (including the background check submission form) but their request may have encountered a technical error which has prevented it from being sent for processing.
Please contact CMG Connect Support for assistance.

“N/A” ENTRY: *User’s submission was blocked and is NOT processing*

If a user completed their full curriculum with the integrated Background Check submission request but their profile already has an “Active” background check on file, CMG Connect will automatically block the request to help avoid unnecessary costs to your organization.

Background Checks

Date Completed	Check Type	Service	Notes
	N/A		
02/01/2018	Search America Plus	Fastrax-Selection.com	

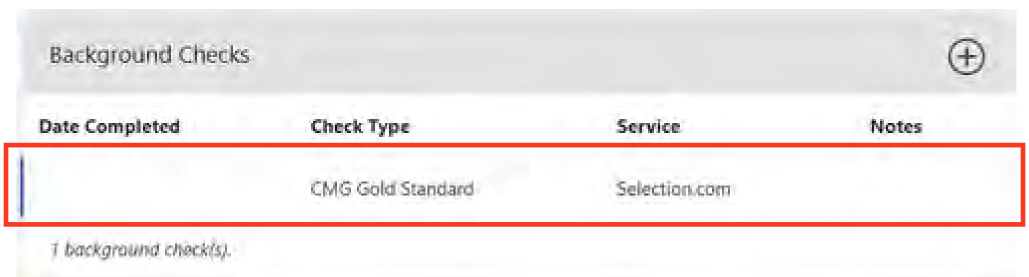
2 background check(s).

*Please note that the **N/A** entry can also mean that the user had an invalid site/location selected at time of their submission or they were under 18 at time of submission. Click the eyeball icon (if visible) to view Notes about the entry or contact support for more information about why the request was stopped.*

User Steps: NONE. However, **if the submission needs to be force submitted,** please contact CMG Connect Support or your Safe Environment administrator so the new request can be processed.

CMG GOLD STANDARD ENTRY (No Date): *User’s submission is SUCCESSFULLY processing*

A *CMG Gold Standard* background type entry WITHOUT a Date Completed indicates that a user’s submission request was successfully sent to Selection.com and is currently being processed.



Background Checks

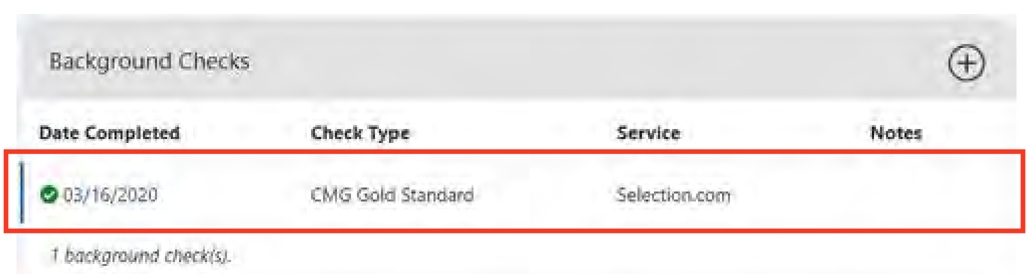
Date Completed	Check Type	Service	Notes
	CMG Gold Standard	Selection.com	

1 background check(s).

User Steps: NONE. Please note that processing can take up to 7-10 business days from the time of submission. The user’s curriculum will remain marked as “Resume” until the report is processed. The record will update to 100% complete when the background check report is returned to CMG Connect.

CMG GOLD STANDARD ENTRY (WITH Date): *User’s background check is COMPLETE*

The Date Completed column will automatically populate when the report results are returned to the CMG Connect platform. Results go to the *Awaiting Review* area of the background check administrator’s dashboard so an appropriate Certification Status to be assigned to the account.



Background Checks

Date Completed	Check Type	Service	Notes
03/16/2020	CMG Gold Standard	Selection.com	

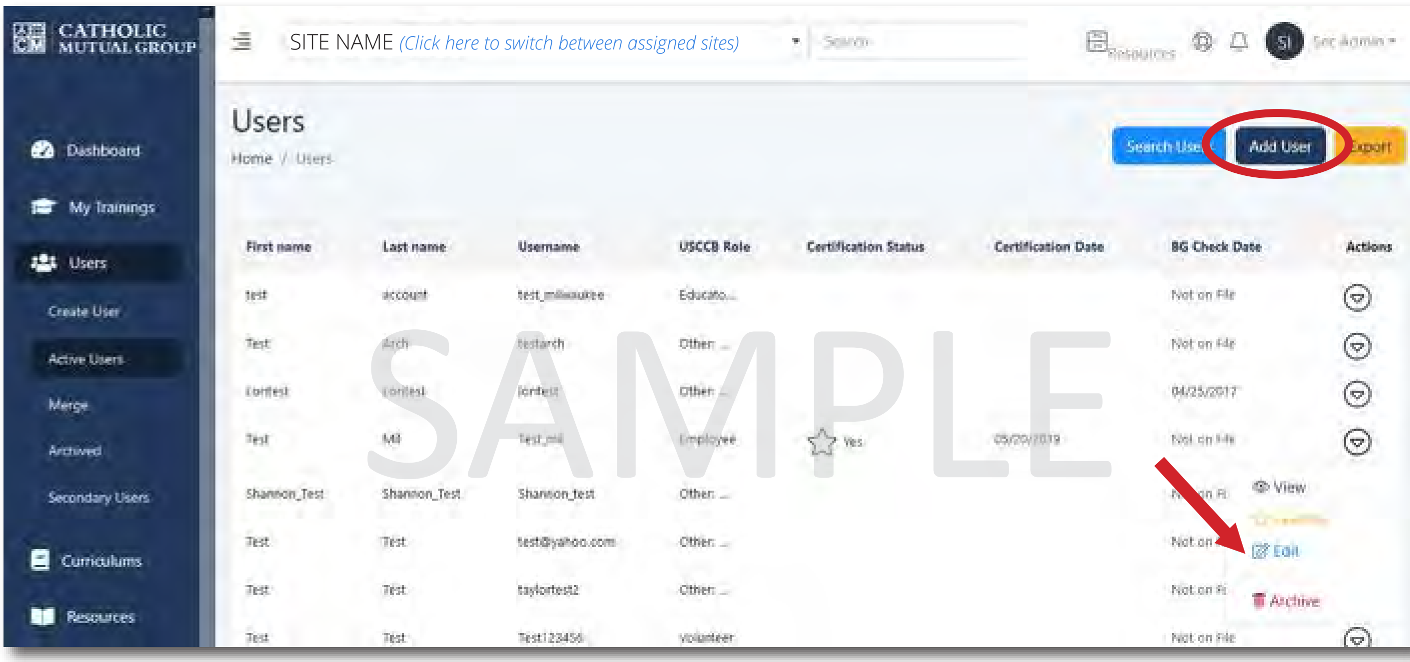
1 background check(s).

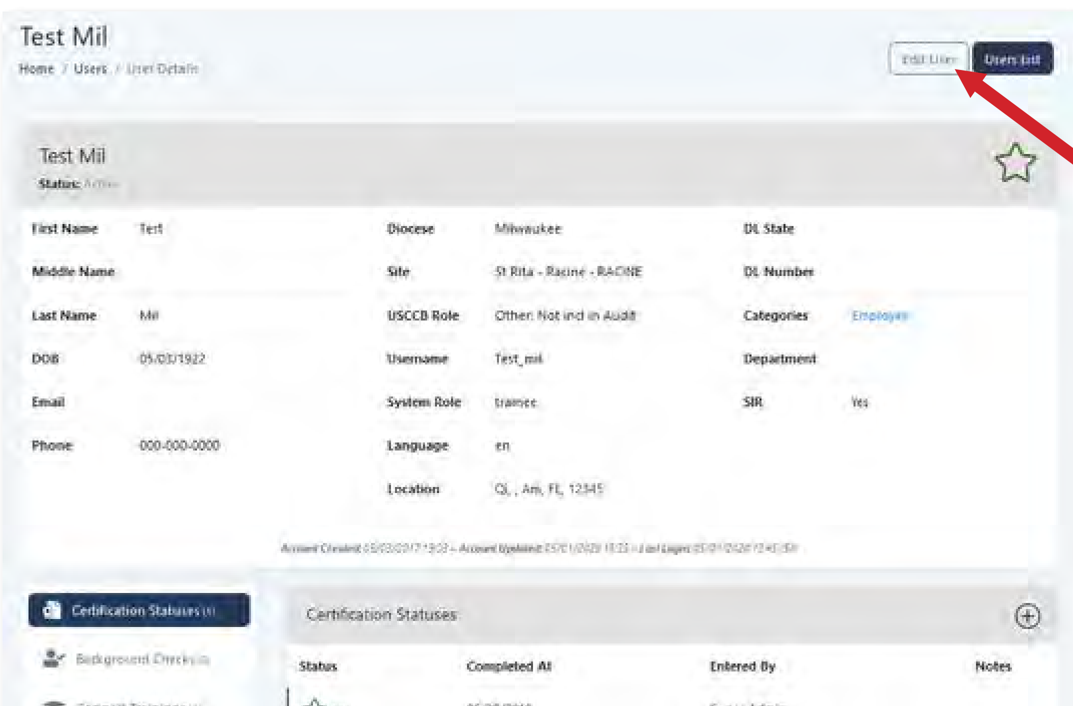
Users Tab: Edit Profile Details

Edit primary users demographic and password information.

1) Click the **Users** tab on the left side of your screen
2) Select **Active Users** from the list. *If needed, use the "Search" tool to locate a specific user.*
3) When you have located the user you want to view, select the "Actions" menu arrow
4) Select **Edit** from the drop-down: Edit
5) *IF NEEDED, click* Add User *to create a new user account*

A user's profile includes how they participate with their location. Please note these categories are subject to change per customization requests by your arch/diocese/organization.





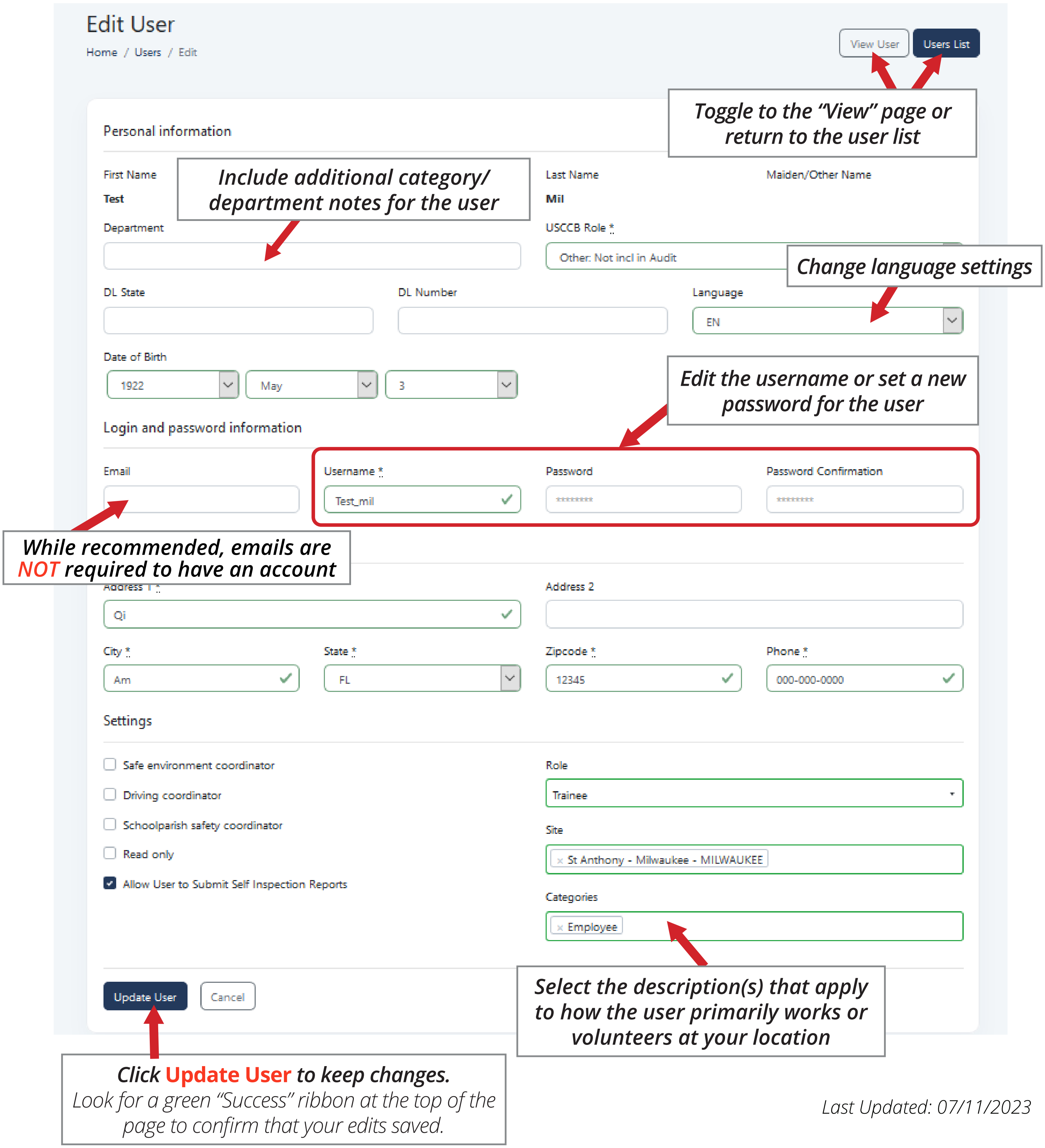
The Edit page can also be accessed via the **View** page of a user's account.

NOTE: You will only have access to Edit an account if the user is primary at your selected site.

Edit Account Details

You can edit demographic information or update email addresses for your primary users. This is also where you can **reset a password** for your user. Click directly in the box and type—we recommend something generic and then advise them to change it once they log in.

If creating a **NEW** account, you will need to fill in the address, city, state, and phone number fields for the profile to save successfully. If unknown, you can type in placeholder text such as a space or one of the following characters: **. - : ; / ***



Last Updated: 07/11/2023

Users Tab: Archived Users

If one of your primary users is no longer actively employed/volunteering at your site, you can Archive their profile to remove them from your Active Users list. Archived users can be recovered, if needed. *Note that a user cannot access their account while their profile is in an Archived state. Training records are **NOT** removed from the user's profile when Archived.*

Recovering Archived Users

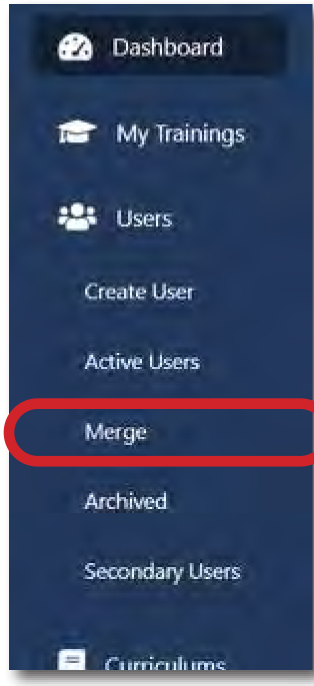
1) Click the **Users** tab on the left side of your screen
2) Select **Archived** from the list. *If needed, use the "Search" tool to locate a specific user.*
3) When you have located the account that you want to Restore, select the "Actions" menu arrow.
4) Click **View** to confirm the account details match the correct individual.
5) Click **Restore** to move the account back to your Active User list

***Note:* You will only be able to restore users that were archived at your location.**
Please contact CMG Connect Support to restore users from other locations.

From the **Archives** page, you can also Export a report a list of all Archived users at your location. Results will download in a CSV file format that can be opened in Excel.

Last Updated: 07/11/2023

Users Tab: Merge



How to Merge Users

If you have a user who accidentally creates a duplicate account, you can consolidate their profiles into one using the Merge tool.

1) Click the **Users** tab on the left side of your screen
2) Select **Merge** from the list.

Combining duplicate accounts takes three steps:
1) Choose the Primary and Duplicate User Accounts
2) Search and Select Users to Merge
3) Merge Accounts

NOTE: You will only be able to merge users who's accounts are both primary at your site.

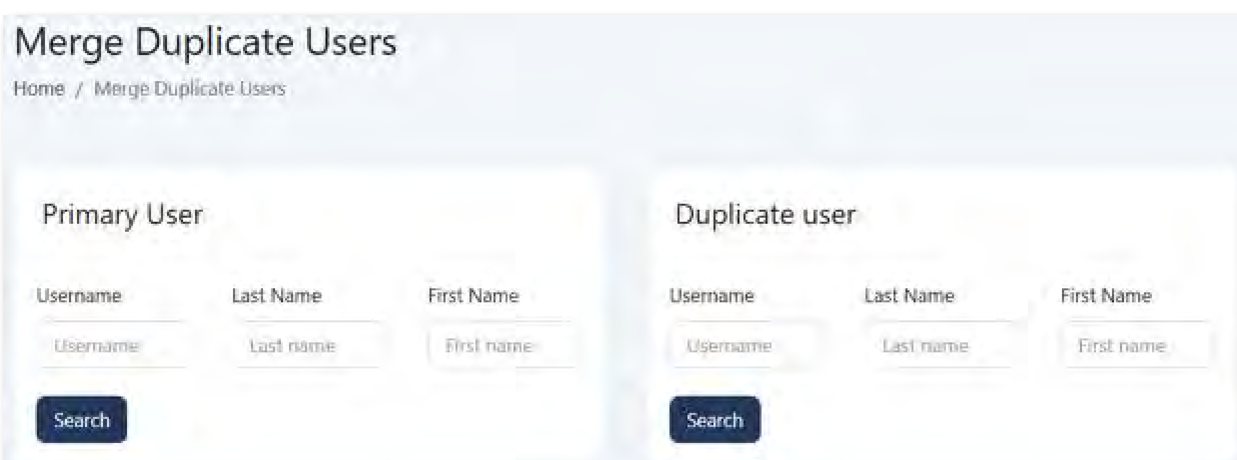
If the duplicate is registered under a different location, please contact CMG Connect Support or your Safe Environment administrator to combine the accounts for you.

Step 1: Choose the Primary and Duplicate User Accounts

Pick one of the user's accounts to be the primary user and the other as the duplicate user. Typically, selecting the account with the most recent "Last Login" date as the primary account will result in the most accurate merged profile.

You will only be able to merge two profiles if both accounts are primary users at your site. All CMG & Imported Training records on file will be retained in the merge process. However, **ONLY the personal information (address/contact info/etc.) for the account selected as primary will be kept.** Details on the profile of the "Duplicate User" will be overwritten.

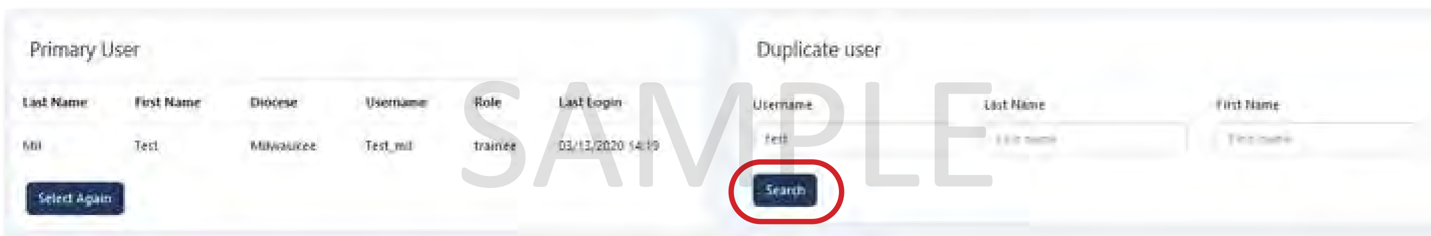
Please verify that the multiple profiles are definitely the same person before proceeding. Once two profiles are merged, the action cannot be undone.



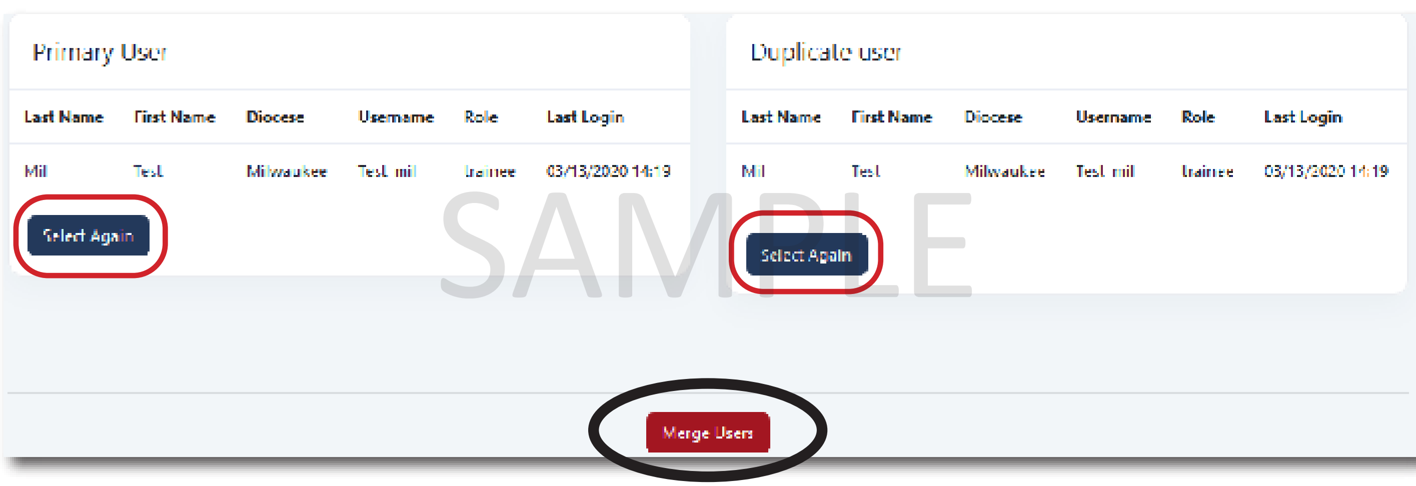
Step 2: Search and Select Users to Merge

Search for each user under primary and secondary individually. Click on the plus icon to 'add' that account to either the primary or duplicate user information.

Once the Primary is selected, complete a search for the Duplicate account to be merged:



Click the plus icon to select the duplicate user. Once both accounts are selected, double-check to make sure you have chosen the correct account as the Primary so the right profile details will be retained. If you select the wrong account, click **Select Again** and repeat the process as needed.



Step 3: Merge Accounts

When you have selected both accounts, the red button will appear. Click **Merge Users**.

****MERGING USERS CANNOT BE UNDONE****

Make sure to check both user profiles to ensure the accounts truly belong to the same individual and need to be merged.

Reports Tab

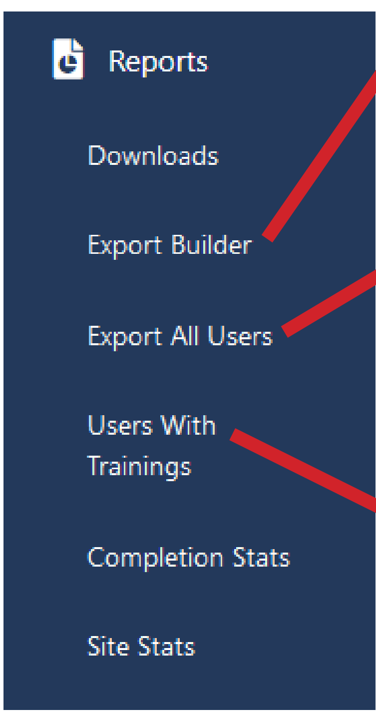
CMG Connect offers many different options to pull data from the platform. All reports wil download in Excel .CSV format, which does not retain formatting. Make sure to "Save As" an Excel file type if you wish to work with a spreadsheet outside of the system and save any changes.

PLEASE NOTE: ***Edits made to downloaded reports will NOT be reflected in CMG Connect.*** Once a report is downloaded, the results are not linked with the platform.

Downloads

The Downloads page lists previous reports that you have downloaded from your administrative account on the platform. Click the **Download** hyperlink to re-download report results.

Note: Clicking "Download" on this page will NOT download real time/updated data from the platform. A new report should be run if you need current data.



Export Builder

The Export Builder tool allows admins to custom select their query details to run reports. Additional instructions for this feature are covered more in-depth in the ***Reports - Export Builder*** guide.

Export All Users

This will run a full report for your location (if site admin) or for the entire organization (if global admin). Columns in the report include basic user information, certification status, background check information, last sign-in and when the account was created.

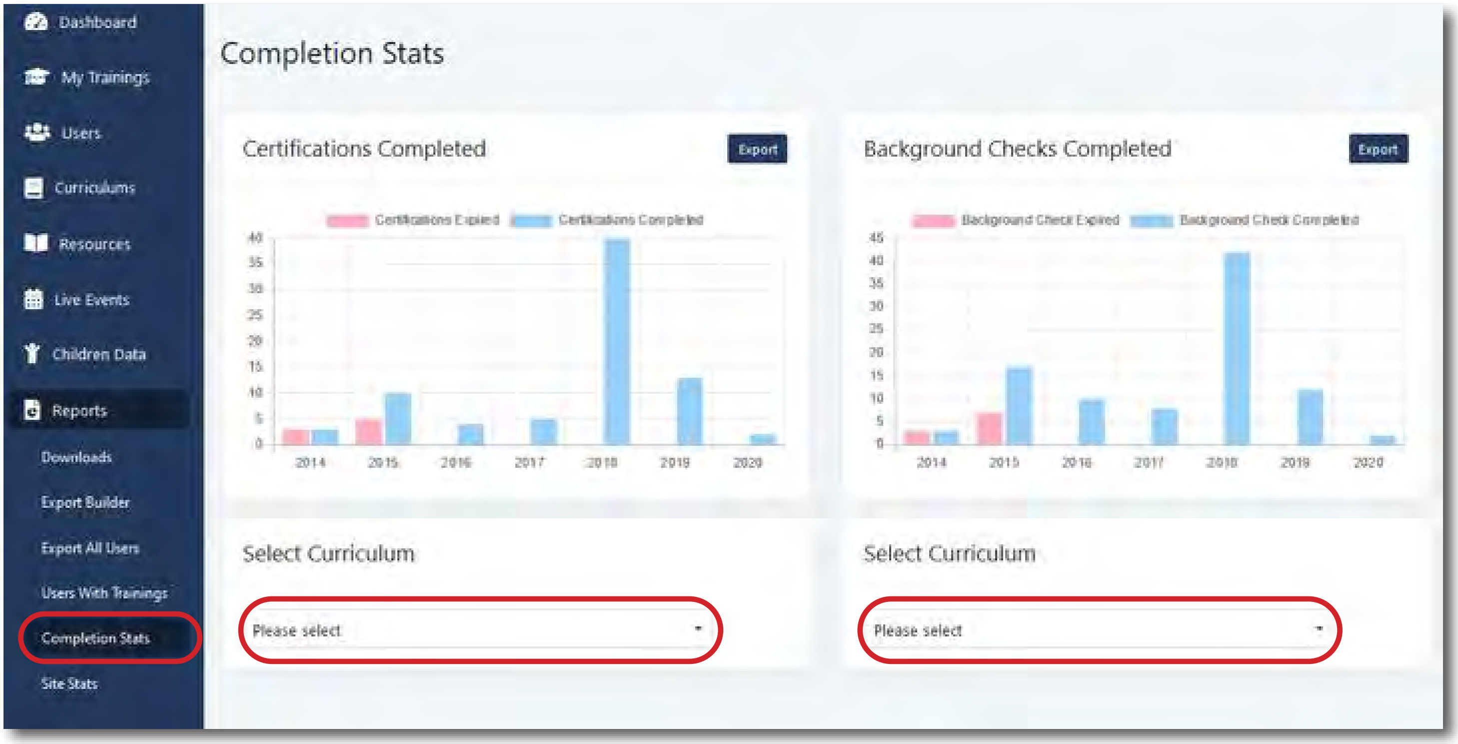
Users With Trainings

This will run a report for all active users with your location (if site admin) or for the entire organization (if global admin) and the trainings each person has completed. Columns in this report include basic user information, certification status, background check information, and every curriculum that is active on your platform.

Completion Stats

This page allows you to view graphs for your location of Year-over-Year (YoY) completion numbers for Certifications and Background Checks.

You can also select a specific curriculum under the "Select Curriculum" area to view graphs of individual training modules. Use the second "Select Curriculum" area to compare two graphs.

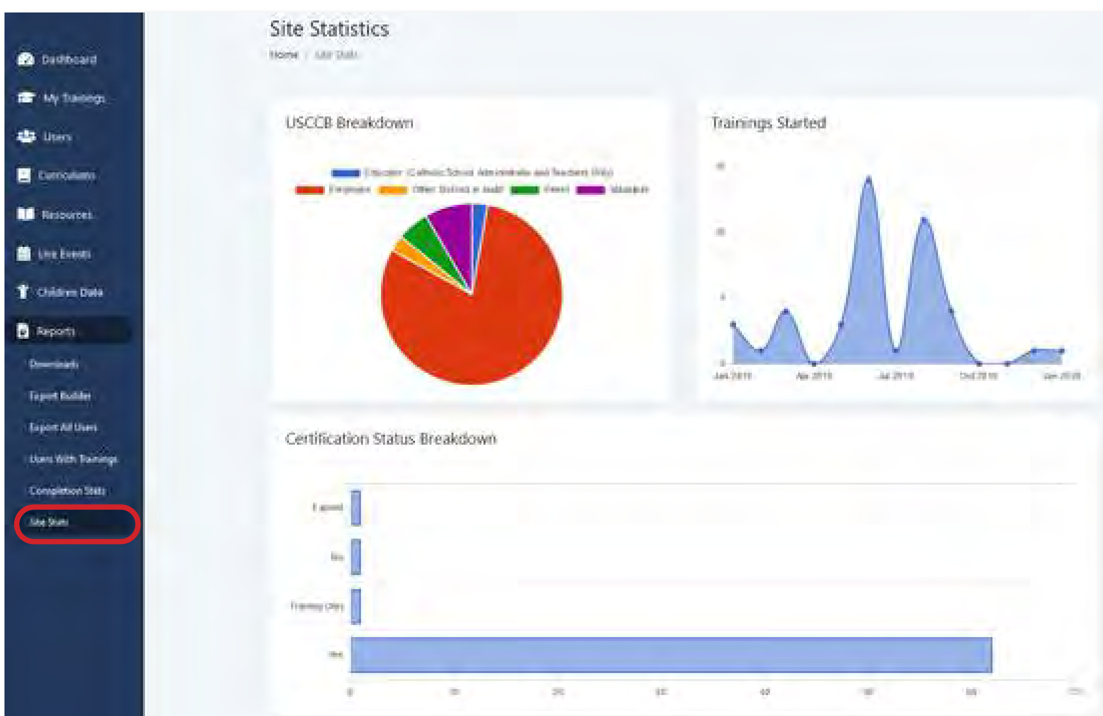


Site Stats

View general statistics for your selected location, including the breakdown of USCCB Roles and Certification Statuses among your users.

Hover over data points on each visual for summary information.

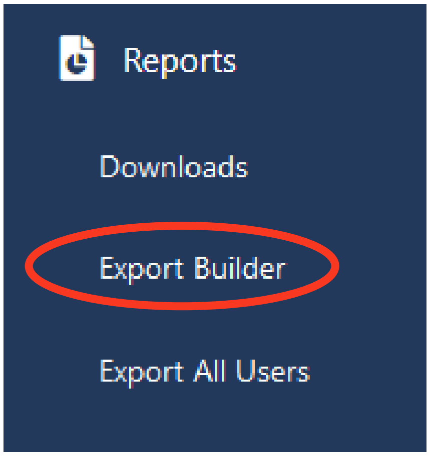
Interact with the USCCB chart by clicking a category to view the updated visual breakdown.



Last Updated: Last Updated: 07/11/2023

Reports Tab: Export Builder Feature

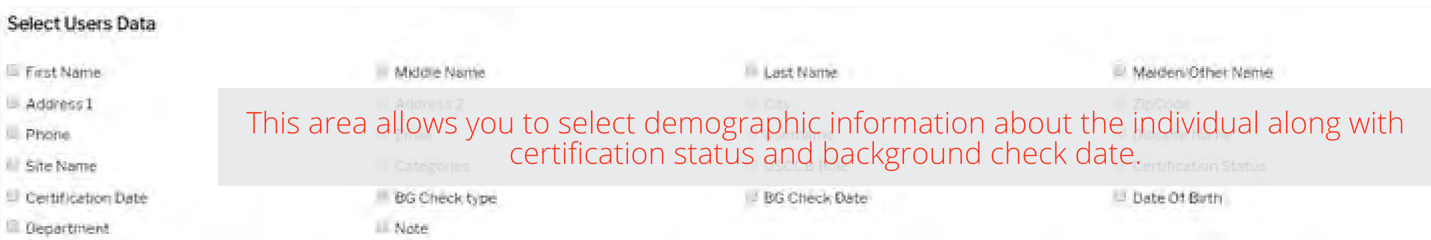
To run reports for multiple curriculum and to select custom criteria for your report, you will be able to use the Export Builder located under the **Reports** tab.

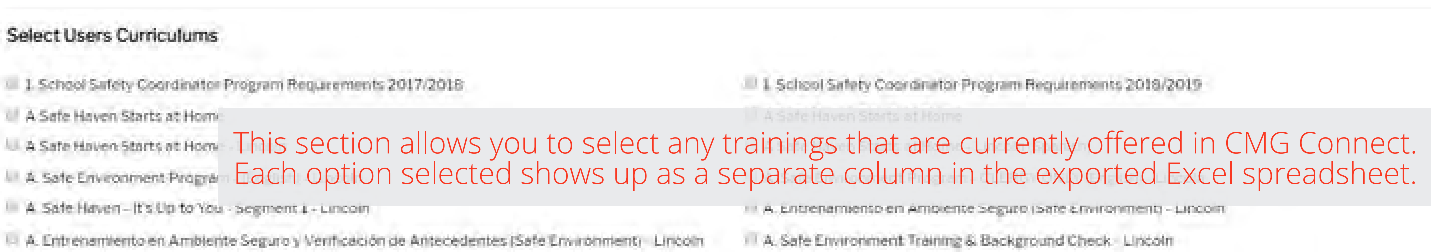


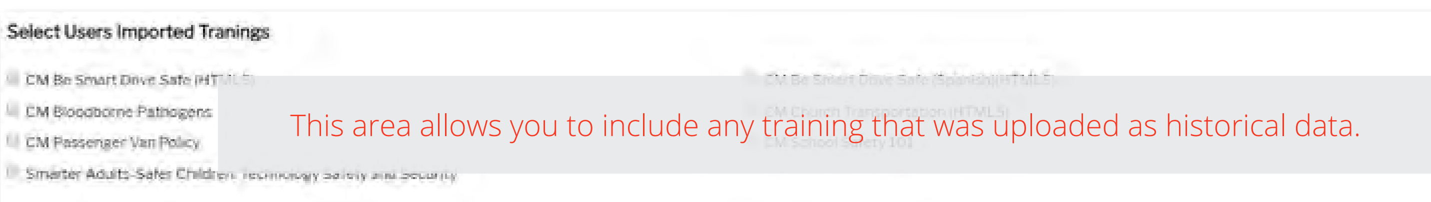
Downloads
Shows the history of all the reports that you have downloaded.

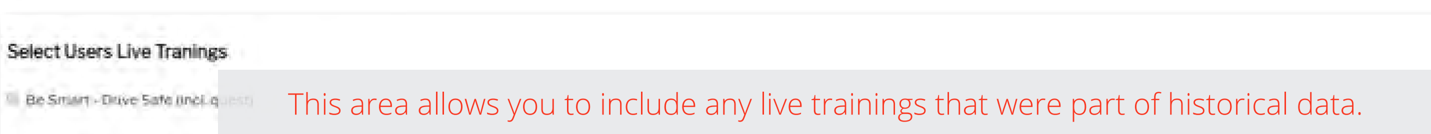
Export Builder
Allows you to select what specific information you want to include in a report to view in an Excel file.

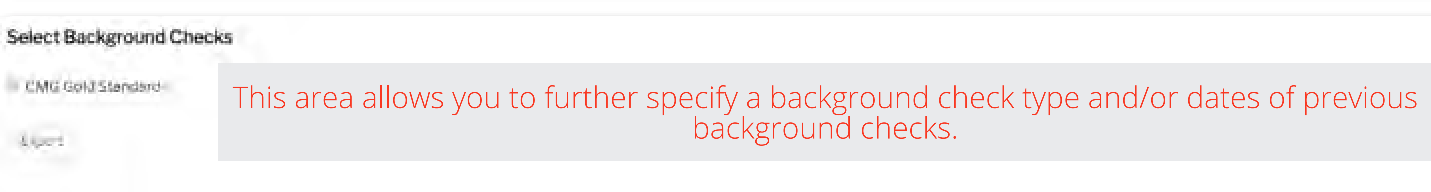
Export All Users
Will export all users affiliated with your site. Includes their certification status and background check date/type.
NOTE: These report may take several minutes depending on the amount of data you are reviewing.









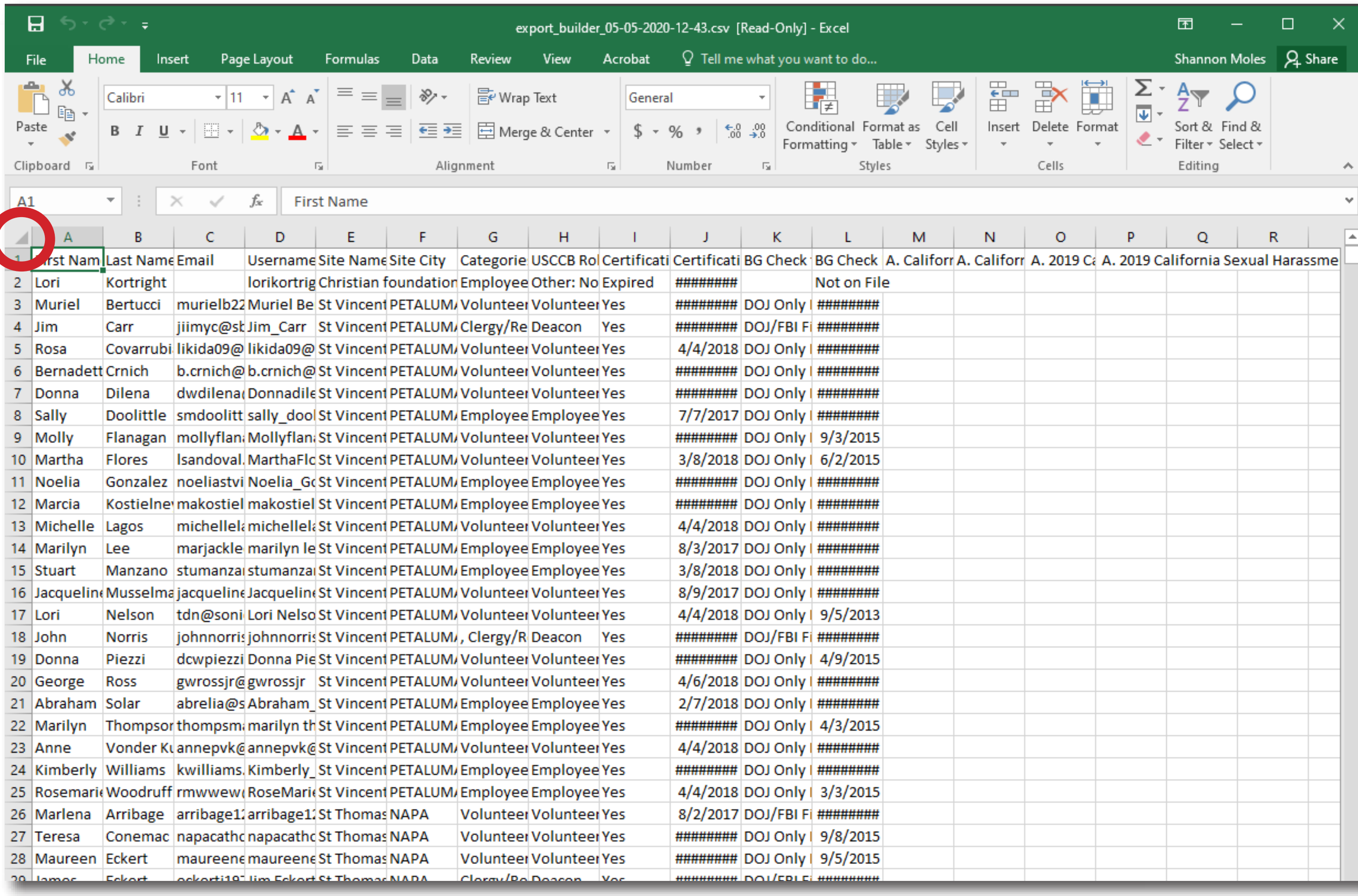


If you have questions about any part of this process,
please contact CMG Connect Support

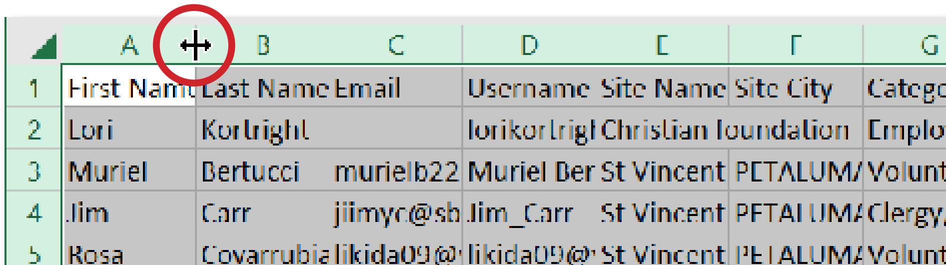
Last Updated: Last Updated: 07/11/2023

Microsoft Excel: *Working with Your Downloaded Reports*

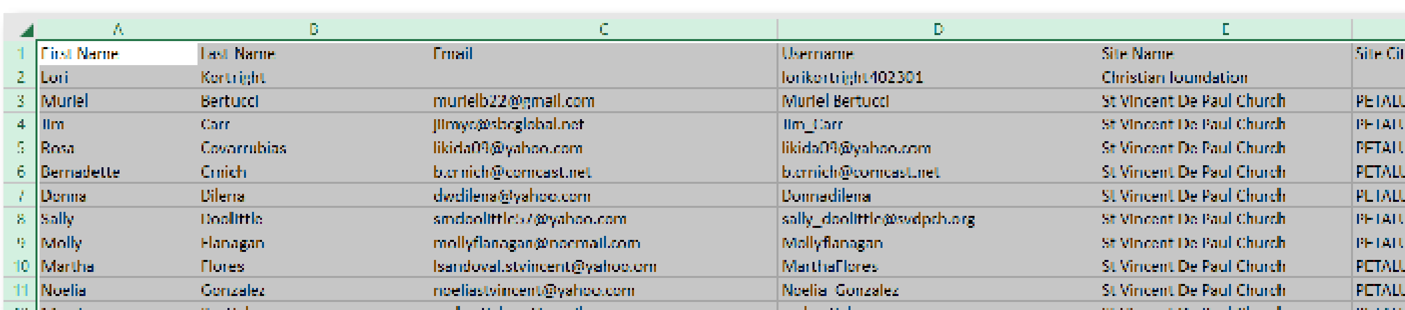
When you open the downloaded file, your Excel will look like the screenshot below. To expand column widths to view the full contents of each cell, click the gray arrow to the left of Column A and above Row 1 (circled).



This will highlight the entire sheet. Move your mouse between Column A and Column B so that the mouse changes to the "split" arrow shown to the right, then double-click.

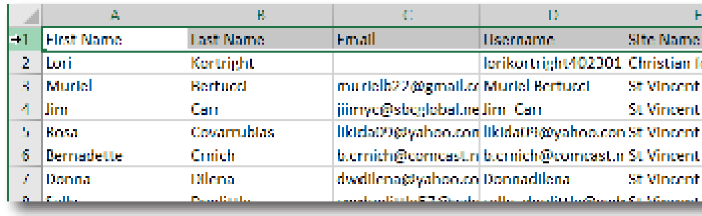


Your columns widths will now be auto-fitted to the data. If you want to make all of the columns the same width, drag and drop the "split" arrow while the entire spreadsheet is highlighted.



Filtering by Category/Column

One of the most helpful tools for working with reports in Excel is the **Filter**. This tool allows you manipulate what information you view based on the contents under each column heading.

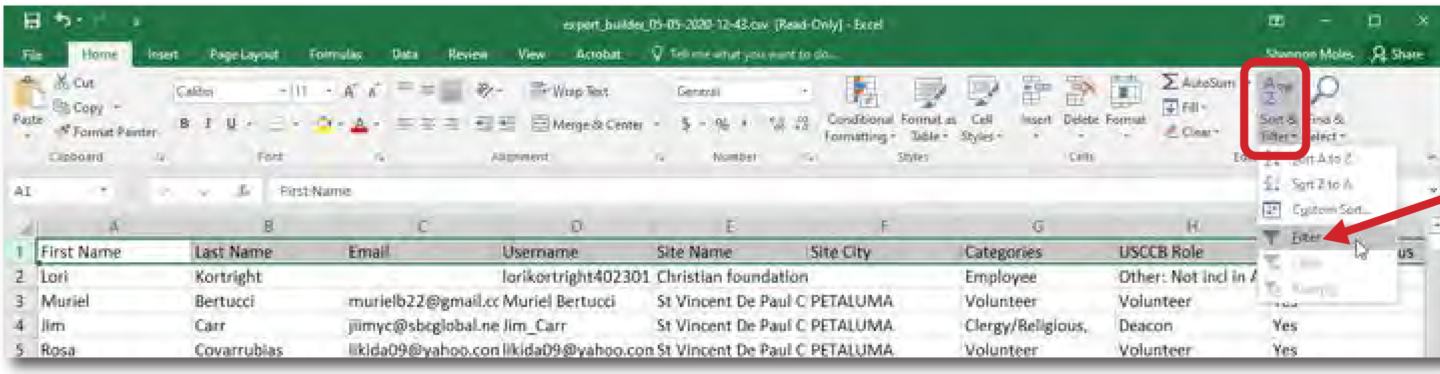


To apply a filter:

1) Select Row 1 of the spreadsheet by clicking the "1" on the far left. *This will highlight the entire top row of the spreadsheet in gray as shown above.*

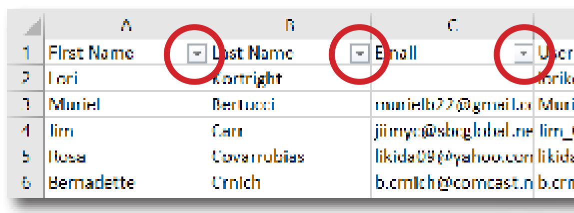
2) After Row 1 is highlighted, locate the **Sort & Filter** button at the top right of your Excel window.

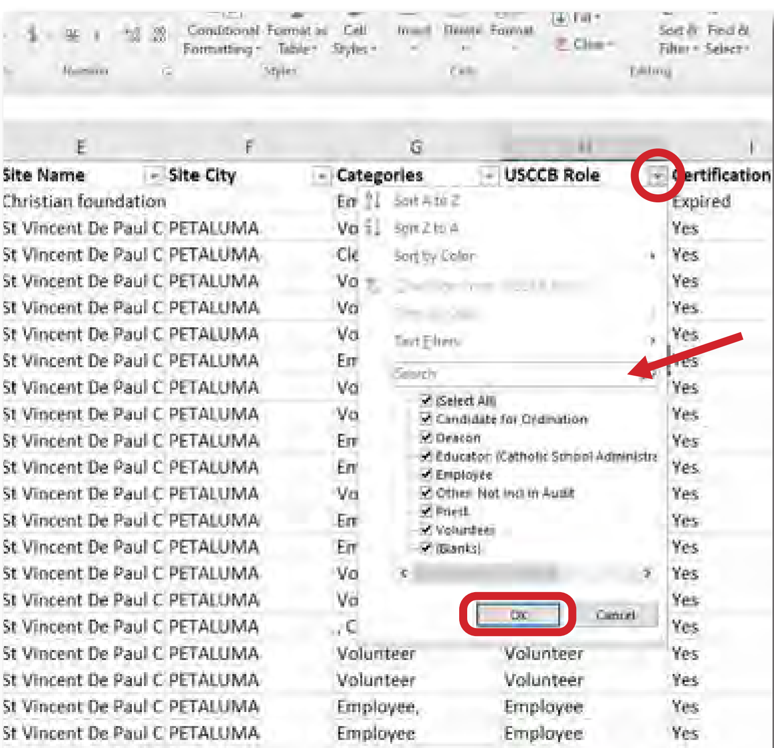
3) While your row is still highlighted, select **Filter** from the drop-down menu.



This will apply small drop-down arrows to each column headings.

To "filter" results for any column, click the arrow in the top row to open up your options. This menu is shown in the screenshot below. Within this menu, you can **Sort** (alphabetically and/or by formatted color) or **Filter** based on the contents of the column.





For example, if you want to only view users who are a specific USCCB category, you can type in the desired criteria in the *Search* field. The list below begins to shorten as you type. When only the category you want is selected, click **OK**. You can also manually select (or deselect) certain check boxes to filter the report view.

Using the filter tool changes the view to ONLY records matching your specific criteria (check boxes) marked.

TO CLEAR A FILTER FOR ONE COLUMN:

1) Click the menu button on the heading.

2) Select **Clear Filter from "*[heading]*"** to unfilter the selected column.

TO CLEAR ALL FILTERS ON YOUR REPORT:

1) Click **Sort & Filter** at the top of the page

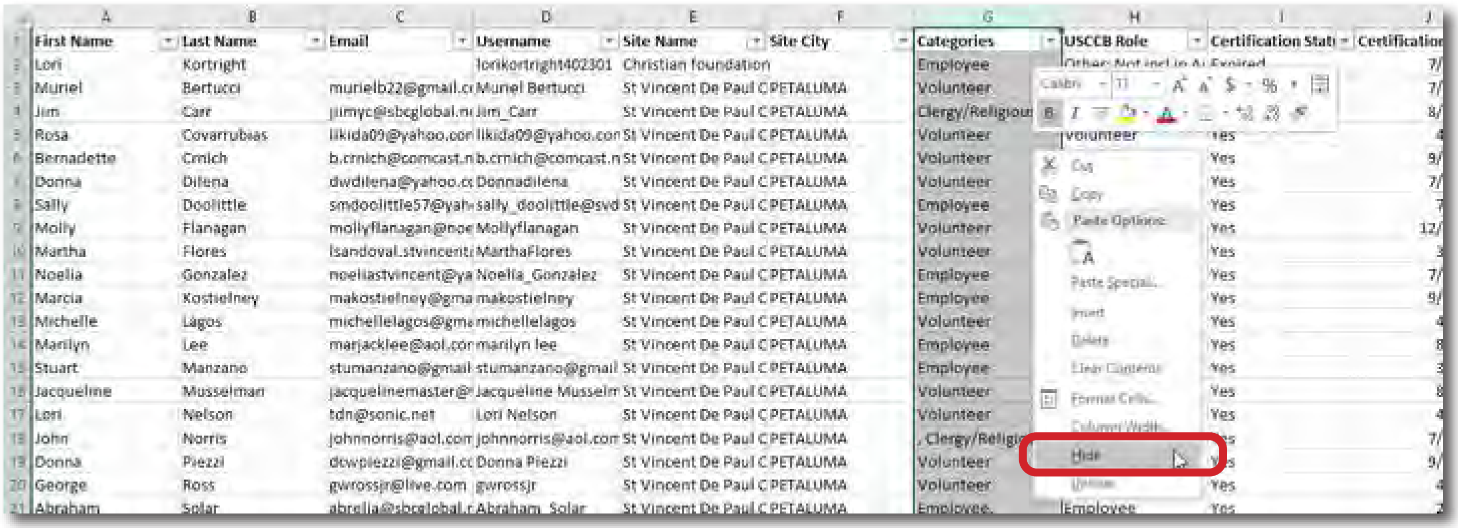
2) Click Clear to view the full spreadsheet

"Hide" Unneeded Columns

If you pull a report with columns that you don't want to view, you can choose to **Hide** the information without deleting it from the spreadsheet. In the sample below, we will hide the ***Categories*** column (Column E).

To hide a column:

1) Highlight the column you want to Hide from your view by clicking the letter above the heading
2) Right click on the highlighted column
3) Select **Hide** from the menu that appears



To view the hidden "Categories" column again later, highlight the surrounding columns (D and F in this example) then follow the same process but select "Unhide" instead of "Hide".

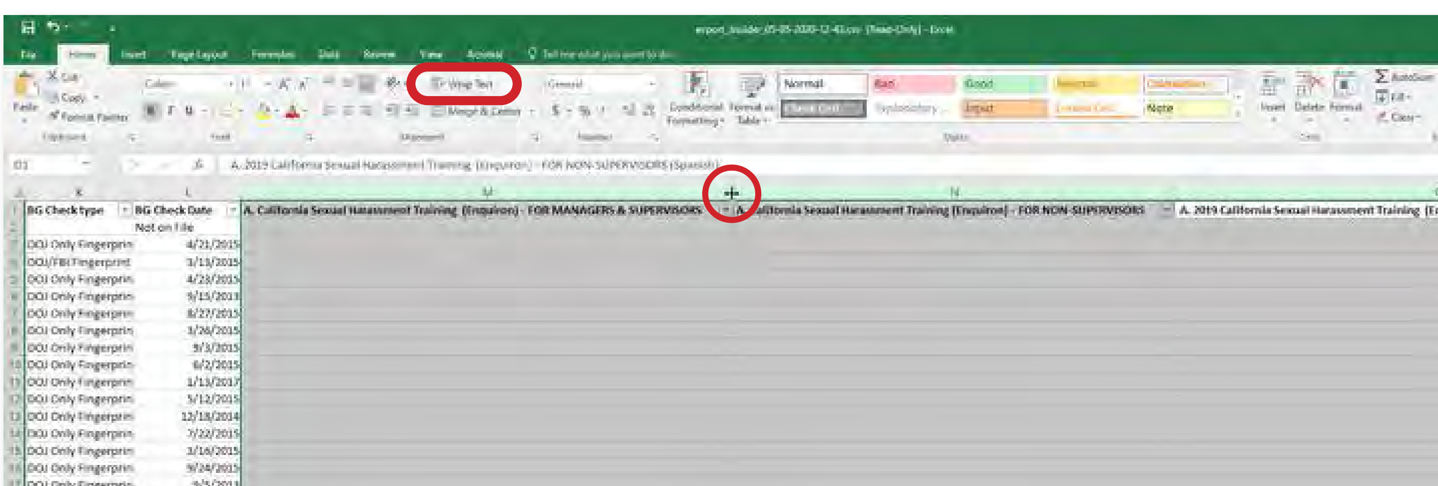
Formatting Column Width

It is sometimes easier to manage data when all columns are the same width. This helps limit the amount that you have to scroll to the right in the spreadsheet to view all of the data.

To change the width multiple columns at once:

1) Highlight the columns you want to update. *(To highlight multiple columns, click the letter above a column and drag in either direction to select adjacent columns. Ex: Columns F, G, and H in the screenshot below).*
2) Move your mouse between the highlighted columns so the "split" arrow icon appears again.
3) Click and drag to adjust to your desired width.

Narrowing your column widths may cut off the words in the top row (headings). If you would like to be able to see the full title/contents of a column, you can click "Wrap Text" while you still have the columns selected.



Sorting by Location: Diocese-level Report

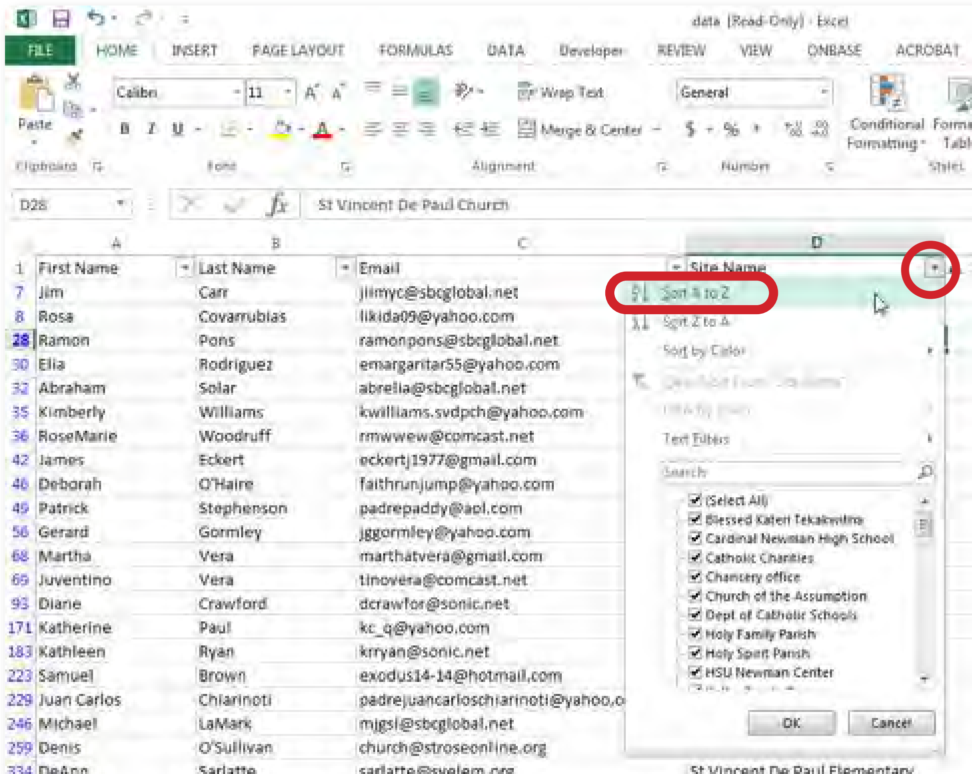
For easier review of a full report, you can sort the list alphabetically by location to organize users.

To Sort a Column:

1) Click the drop-down arrow for the column.
(In this example, you would select the arrow for the **Site Name** *column.)*

2) Select **Sort A to Z** to organize the column alphabetically.

Note: In order to have the option to sort by Site Name/Site City, you must select those on the Export Builder when initially selecting the criteria for your report.

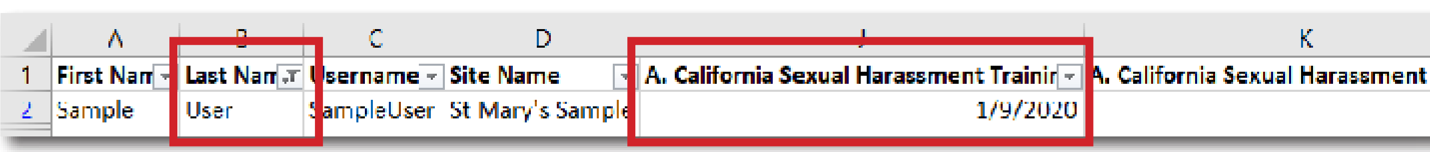


Reviewing Training Records

The dates under each training column (curriculum title) heading reflect when the user completed the curriculum on CMG Connect. Please keep in mind that results from the Export Builder include both percentages of in-progress trainings AND completion dates of finished records.

When reviewing if an individual has completed training, you can look up their name (either using Ctrl + F or using the Filter tool in the name columns) then look under the column of specific headings to see if there is a completion date. You can also filter by completion date for each curriculum/column. This process can be done within CMG Connect via "View Curriculum" page as well.

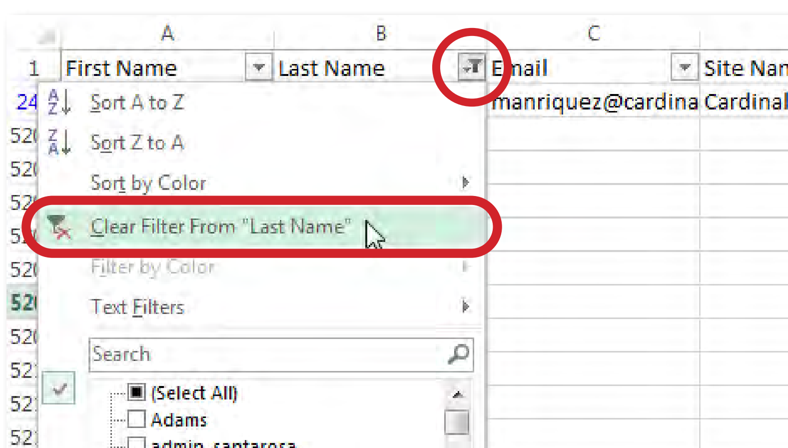
The sample below is filtered by the last name of Sample “User”. Following their details to the right, we can see that account completed the curriculum listed in Column J on **1/9/2020**.



TO REMOVE AN APPLIED FILTER:

1) Click the menu button on the heading.

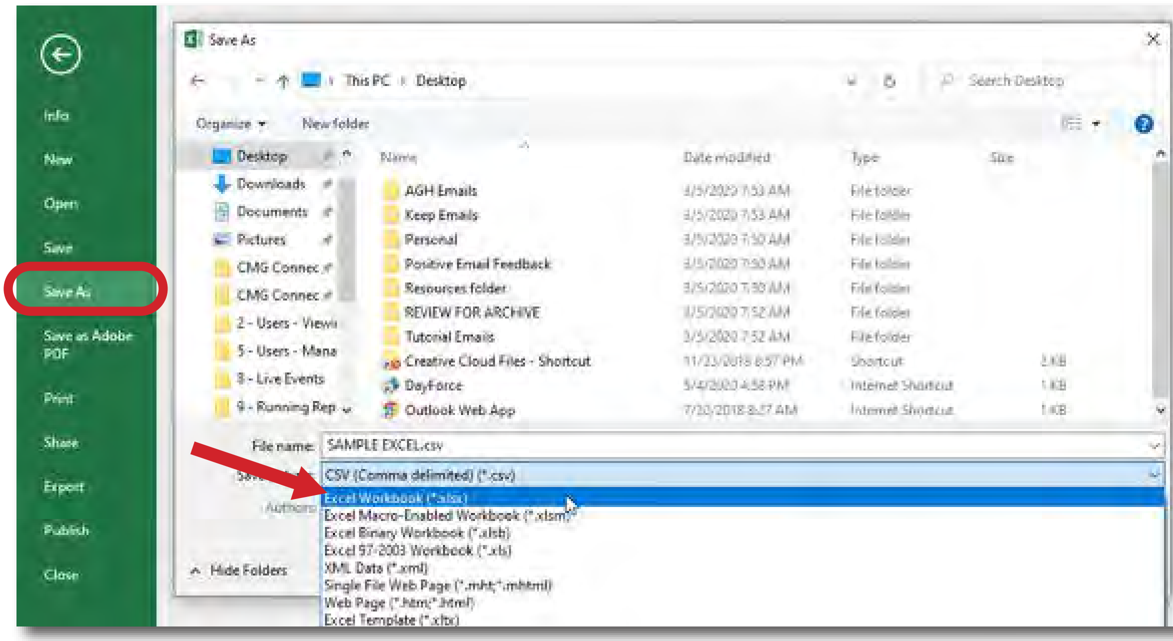
2) Select **Clear Filter from “*[heading]*”** to unfilter the data in the selected column.



Saving the Report

When saving your spreadsheet, make sure to change the file type to retain all of your formatting changes.

1) Click **File** in the upper left corner
2) Select **Save As** from the menu options on the left side of the screen
3) Choose where you want the file to be saved. *(You may need to click "Browse" to find a specific file location.)*
4) If needed, edit the **File Name** field
5) Click the drop-down list for **Save as type** and select 'Excel Workbook' from the list
6) Click **Save**



Printing the Report

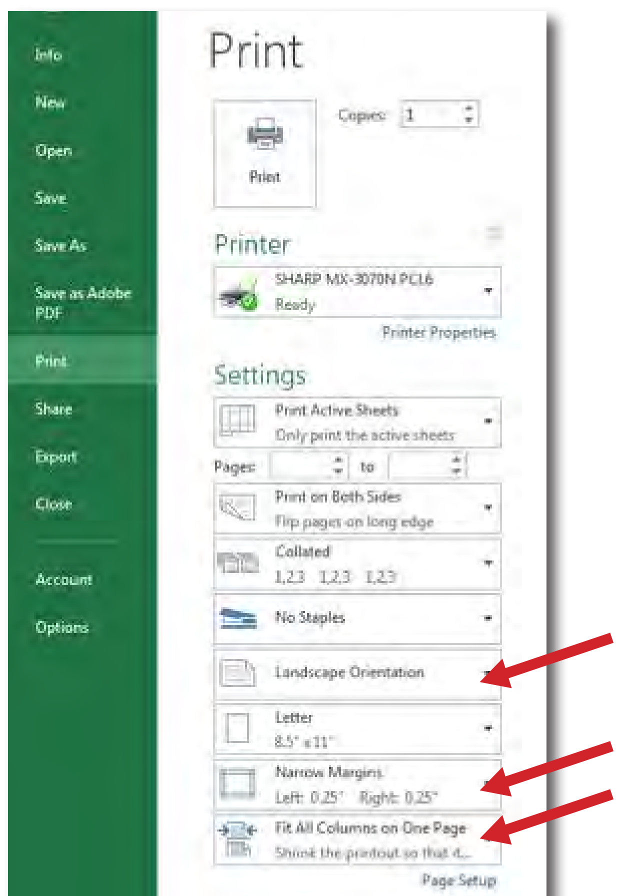
For best printing/viewing results, you may want to change your print settings.

To print your report:
1) Click **File** in the upper left corner
2) Select **Print** from the menu options on the left side of the screen

Other Tips for Print Settings:
Change the page orientation to **Landscape Orientation** to fit more columns on the printed page.

Set **Narrow Margins** to allow your data to print closer to the edge of the page and attempt to fit more columns.

Under the last option for scaling, select **Fit All Columns on One Page**. Excel will automatically shrink the view of your data to fit all columns on a single page.
Other scaling options may better suit your needs to make sure the print is still a readable size once printed.

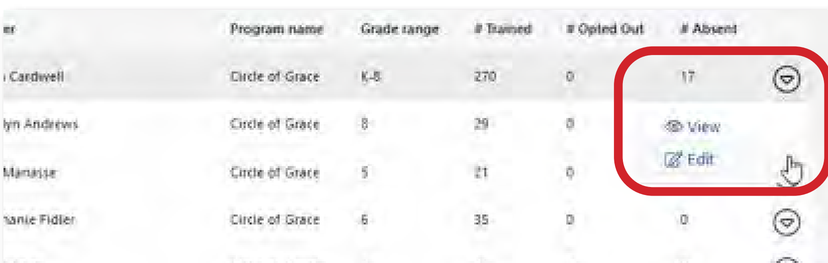


Children's Training Data

You can input children's training numbers in CMG Connect. From this feature, you can Search existing records, Add new data, pull a Training Data Report, or Export all entries for your location.

Click **Add** to enter training numbers.

Fill in all fields then click **Save Training Data**. The newly saved record can be viewed by returning to the Children Data page.



Once created, you will have the option **View** or **Edit** the entry.

Please contact CMG Connect Support if you need a record to be Deleted.

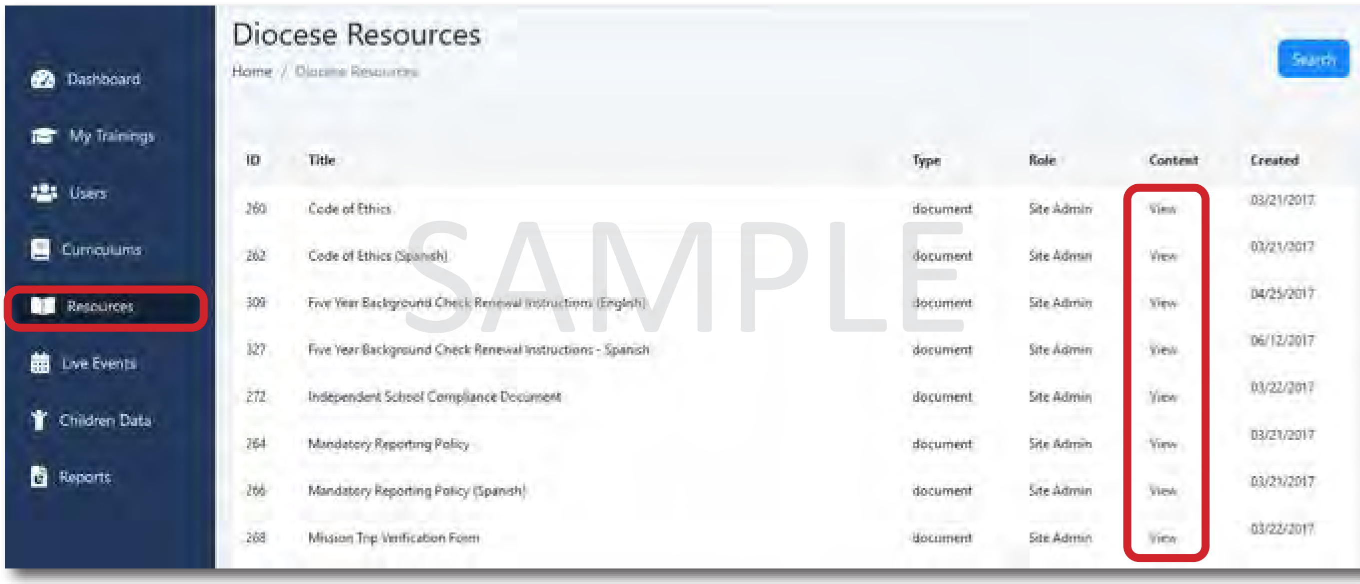
A **Training Data Report** for each location if desired. Select the desired date range and program then click **Generate Report**. The resulting page can be printed if signatures are required.

Resources: Administrative & End Users

Various resources for your organization can be stored privately for administrators only or publicly to be available for all end-users, as with the Catholic Mutual CARES Resource Library.

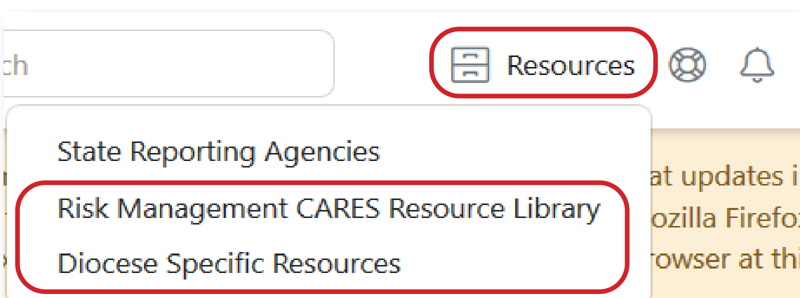
Resources Tab: Administrators

The resource area can be used to store administrative guides, specific forms your organization uses, children's training lesson plans, etc. We will store your administrative guides in this area for easy access. Click to ***View*** to open the document or URL in another window.



Resources: End Users

At the top of all accounts is another resource area for your specific policies and documents, as well as full access to the Risk Management CARES Resource Library. The State Reporting Agencies feature is also listed.



Using the "Search Library" button, users can look up documents by name or keywords to easily navigate Catholic Mutual's full library of best-practice documents.