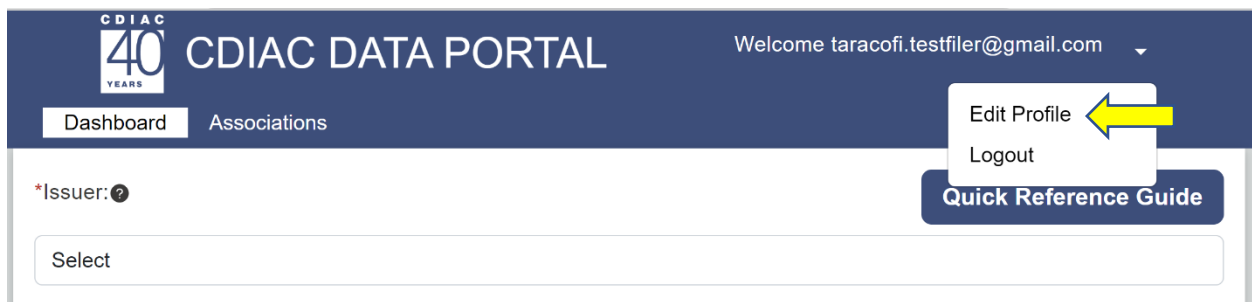


Registered users can view and update contact information through the Data Portal, including adding new contacts for their respective entity. Many registered users will see old contacts listed for their entity as “Active”. CDIAC recommends that users update their entity’s Contact list to the most current information to facilitate the filing of reports of issuance and ongoing annual reports.

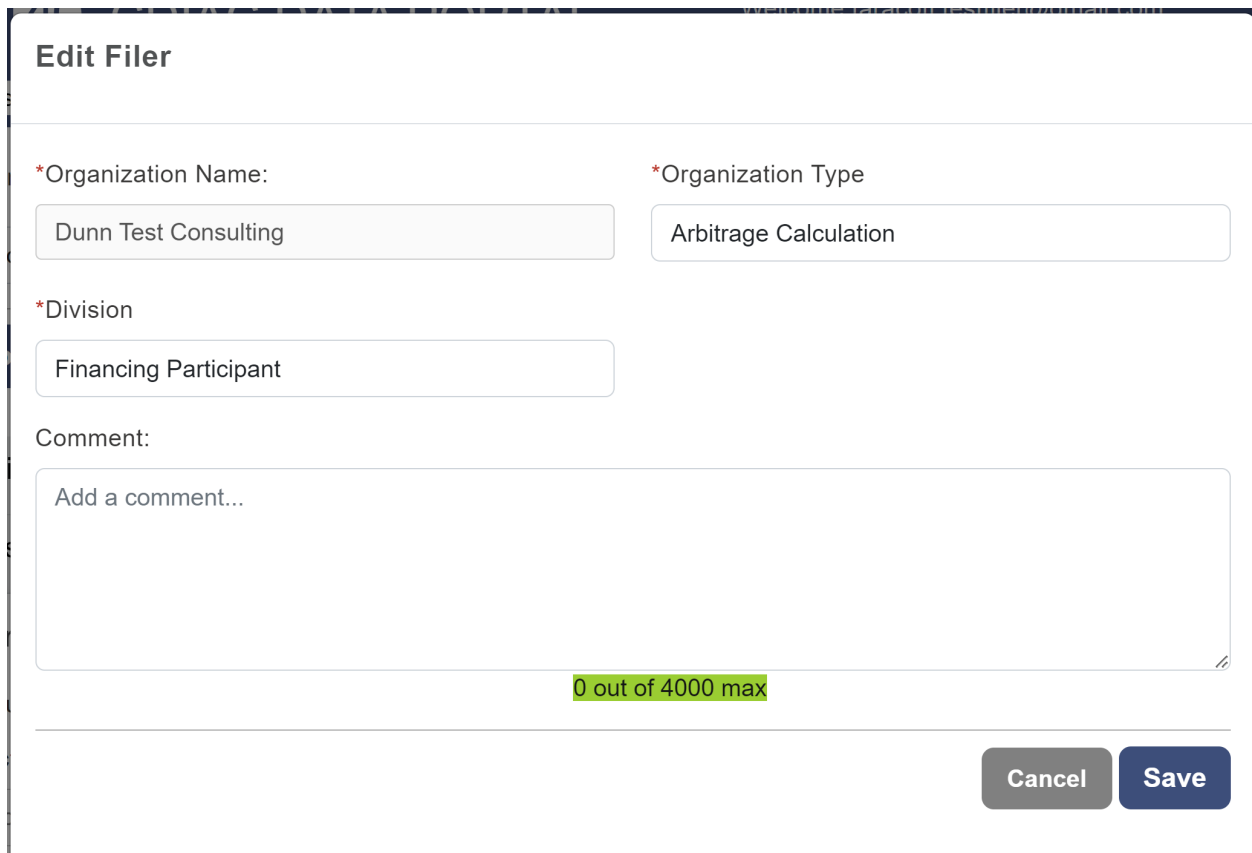
Issuer users are the staff of a Public Agency.
Organization users are affiliated with a private business providing a service to the Issuer as a Financing Participant.

To view the Contacts, sign in to CDIAC’s new Data Portal and click “Edit Profile” from the drop-down menu below the email address.

(The examples shown below are for an Organization/Financing Participant user type.)



A window appears showing the Entity Name, Type and Division as categorized in Data Portal.







At the bottom of this window are any Contacts the Data Portal has a record of for the entity. Users may click the pencil icon in the Action column to edit and update the contacts listed. Users may also create new Contacts by clicking “Create Contact”.

Contacts:



Create Contact

Contact First Name	Contact Last Name	Contact Email	Is Active?	Action
Tara	Dunn	taracofi.testfiler@gmail.com	Yes	 
Sally	Filer	tdunn.cdiac.sto@gmail.com	Yes	
Gmail	Test	tmdunn+testfiler@gmail.com	Yes	

EDITING CONTACTS

By clicking the pencil icon next to an existing contact, a user may edit the name, address and phone number of the listed contact. **NOTE: If an email is displayed and the box is greyed out, no changes may be made to the existing email address.**

Edit Contact

*Contact First Name: Contact Middle Name:

*Contact Last Name:

Primary Contact?

*Address Line1: Address Line2:

Address Line3: Address Line4:

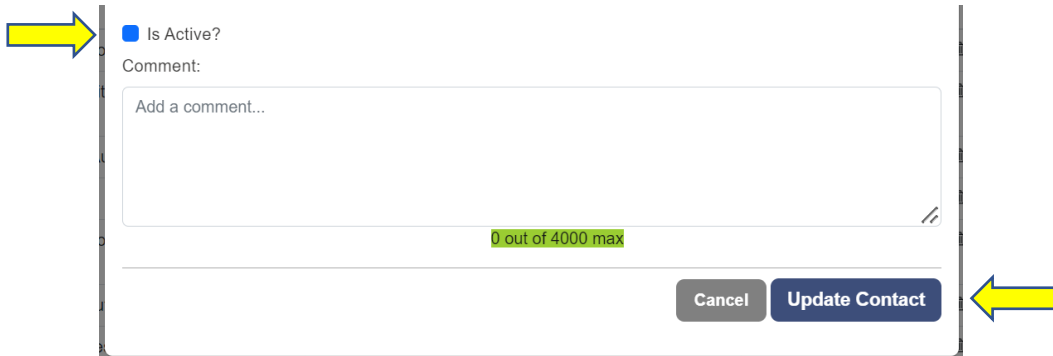
*City: *State: *Zip Code:

*Area Code (XXX): *Phone Number (XXX-XXXX): Ext:

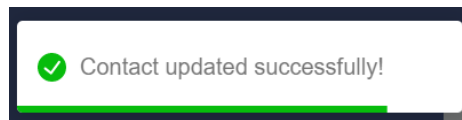
Fax Area Code (XXX): Fax Number (XXX-XXXX): E-Mail:

Below the address and phone number sections is a box and the question “Is Active?” If this box is shaded it means the Contact is “Active” and “Yes” will appear in the column shown above listing the Contacts for the entity. If the box has no shading, it means the Contact is “Inactive” and will not appear as a choice in the Financing Participants drop-down list for issuance reports.

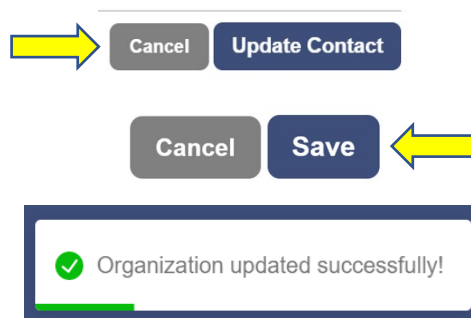
After completing the edits, click “Update Contact”. A status bar saying “Contact updated successfully!” will appear if the changes were accepted in Data Portal.



The screenshot shows a form with a blue header containing a checked checkbox and the text "Is Active?". Below this is a "Comment:" label and a text input field with the placeholder "Add a comment...". At the bottom right of the input field, it says "0 out of 4000 max". At the bottom of the form are two buttons: "Cancel" and "Update Contact". A yellow arrow points to the "Update Contact" button.







To exit these windows and return to the dashboard after editing a contact, click “Cancel” and then “Save” on the prior Window. A status bar saying “Organization updated successfully!” will appear if the changes were accepted in Data Portal.



Example of Inactive Contact:

Contacts:

Create Contact

Contact First Name	Contact Last Name	Contact Email	Is Active?	Action
Tara	Dunn	taracofi.testfiler@gmail.com	Yes	
Sally	Filer	tdunn.cdias.sto@gmail.com	No 	
Gmail	Test	tmdunn+testfiler@gmail.com	Yes	


The inactive Contact no longer appears in the drop-down menu for Financing Participants.

Add Financing Participant

*Financing Participant:

*Contact Type:
 Organization Issuer Representative

*Other Role:
Organization Name



CREATING CONTACTS

Users may create a new contact for their entity by clicking the “Create Contact” button.

Contacts:



Contact First Name	Contact Last Name	Contact Email	Is Active?	Action
Tara	Dunn	taracofi.testfiler@gmail.com	Yes	
Sally	Filer	tdunn.cdiac.sto@gmail.com	No	
Gmail	Test	tmdunn+testfiler@gmail.com	Yes	

A window appears for the user to enter the name, address, phone number and email address for the new contact.

Create New Contact

*Contact First Name: Contact Middle Name:

*Contact Last Name:

Primary Contact?

*Address Line1: Address Line2:

Address Line3: Address Line4:

*City: *State: *Zip Code:

*Area Code (XXX) *Phone Number (XXX-XXXX) Ext

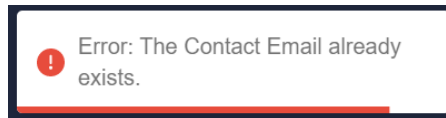
Fax Area Code (XXX) Fax Number (XXX-XXXX) E-Mail:

See **NOTE** on [next page](#)

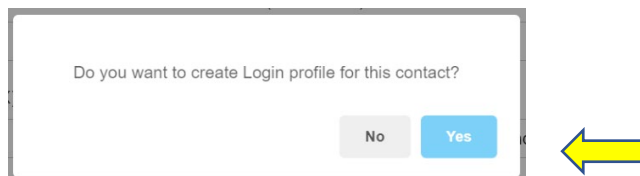
Is Active?
 Comment:
 Add a comment...
 0 out of 4000 max

After completing the information for the new contact, click “Create Contact”.

NOTE: If the email already exists in Data Portal an error message will be displayed.

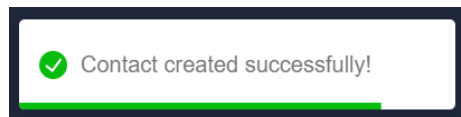


If the email address entered for the new contact is unique to Data Portal a pop-up box will appear asking “Do you want to create Login profile for this contact?”

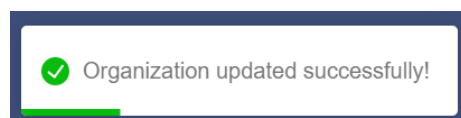


Clicking “Yes” will send the new contact a temporary password to use to Sign In to Data Portal.

Clicking “No” will add the new contact’s email address to Data Portal as choice in the Financing Participant drop-down menu but will NOT send a temporary password to that email address to Sign In to Data Portal. After completing the steps above, click “Create Contact”. A status bar saying “Contact updated successfully!” will appear if the changes were accepted in Data Portal.



To exit these windows and return to the dashboard after creating the new contact, click “Cancel” and then “Save” on the prior Window. A status bar saying “Organization updated successfully!” will appear if the changes were accepted in Data Portal.



ADDITIONAL GUIDES ON THE WEBSITE

To view additional guides about using the Data Portal please visit the [Reporting Debt Issuance](#) webpage.

