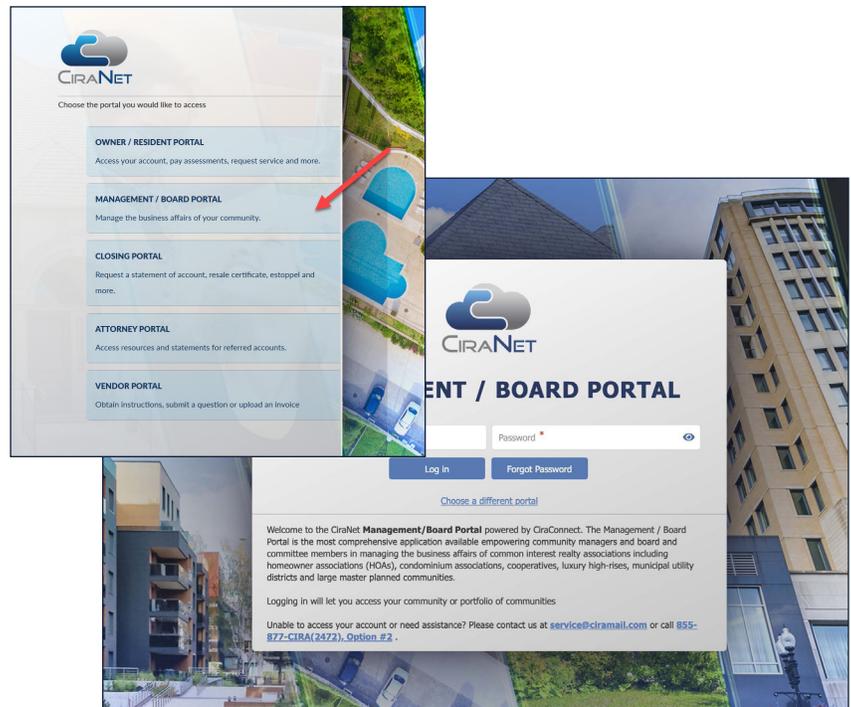# Management Portal Login and Navigation for Executive Users

Welcome to the CiraNet Management/Board Portal! This is a quick guide to logging in and learning to navigate the Management/Board Portal.

Welcome to the CiraNet Management/Board Portal! This is a quick guide to logging in and learning to navigate the Management/Board Portal.

Login From the Main Portal Menu

The main website menu listing all available user portals is www.ciranet.com. Once there, you will see a menu of available portals, the Management/Board Portal being one of the options. Enter your username and password on the login page.[1]

[1] This is the same as you use for CiraMobile and, if you are a returning user, the "Classic" Management/Board Portal.

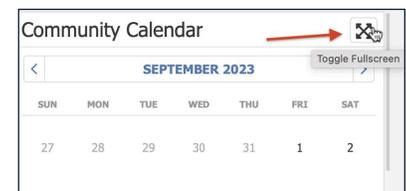# Management Portal Login and Navigation for Executive Users
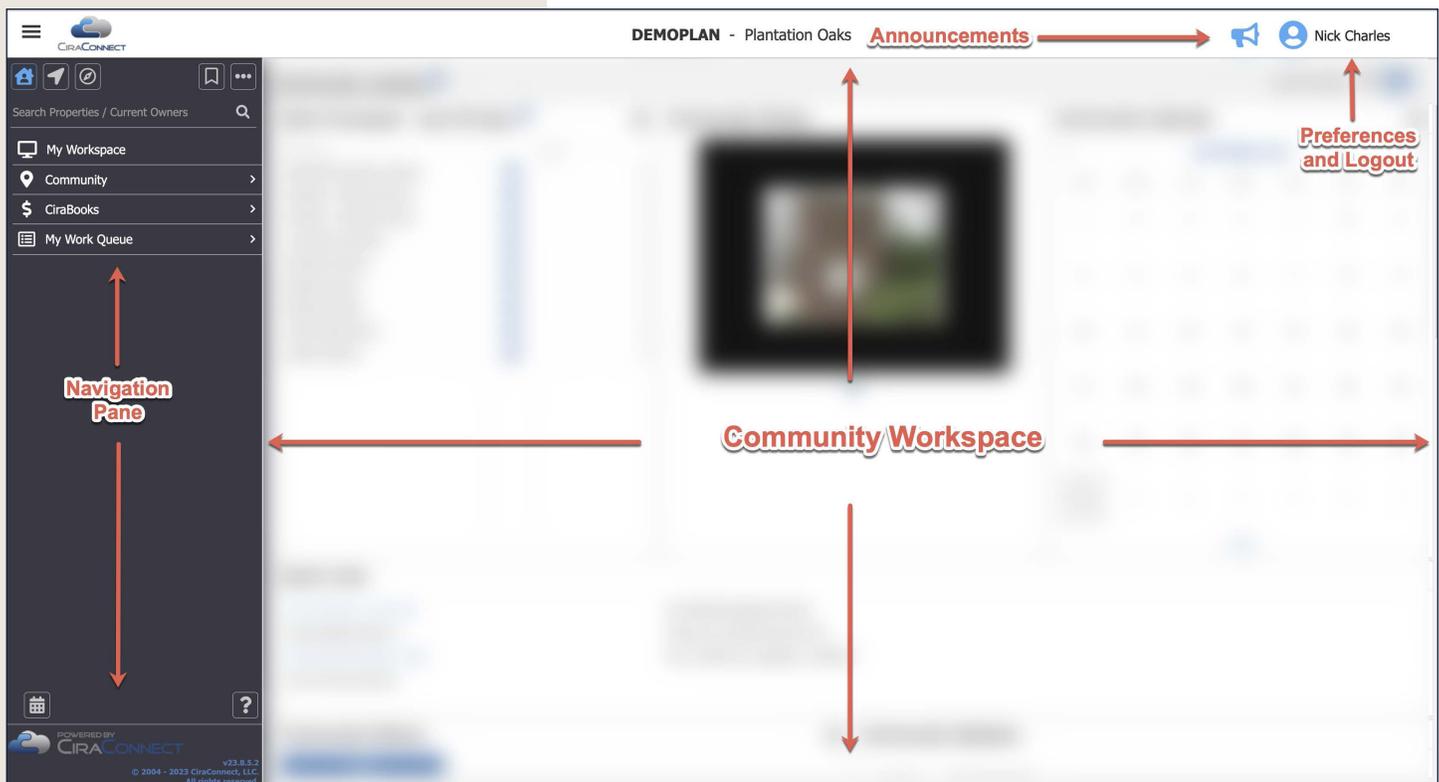
[1] Individuals who serve on multiple communities are the exception.

[2] To learn more about Workspaces, refer to the CiraConnect Using Management Portal Workspaces Tip Sheet (Board Edition)

Community Landing Page

The initial landing page for most board members[1] is the **Community Landing** page. This page is a **Shared Workspace**[2], meaning it is a series of "widgets". The advantage here is that each component can be expanded to a full screen view simply by clicking the "**Toggle Fullscreen**" control. When you are done, click in the same location to restore its original size.

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Pie charts are located on the page called **Graphs & Metrics**. Click on the hamburger menu at the top right-hand side of each graph to see print options.

If you are using multiple versions of CiraNet at once, we advise that you open them in separate browsers (Google Chrome, Mozilla Firefox, Microsoft Edge, etc.)

News and Announcements

When initially logging in, any unread **News and Announcements**, such as upcoming board training opportunities or system alerts, will pop up in the front and center of the page.

Once you have read your announcements and closed the box you can access them again by clicking on the bullhorn icon in the upper right-hand corner of the page.
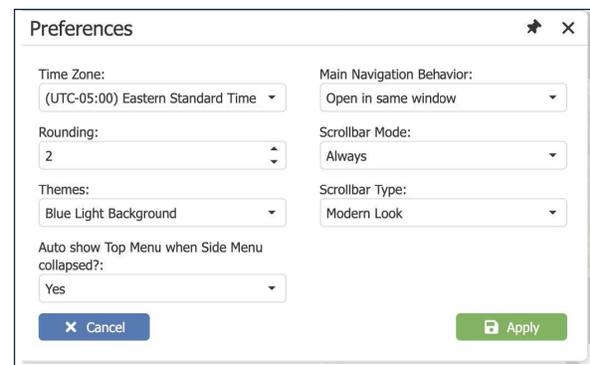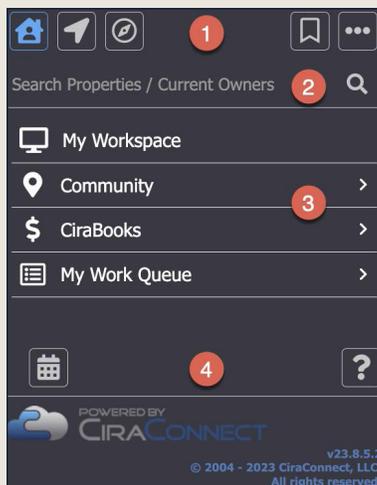
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Preferences and Log Out

Clicking on your name in the upper right-hand corner of the page will allow you to select from two options:

→ **Preferences**. This option allows you to tailor the page view and behavior to your individual preferences.

→ **Log Out**. It is recommended best practice to log all the way out of your browsing session when you are done working as opposed to simply closing the tab or browser. Not only for security reasons but it releases resources for other users and helps you log in fresh to whichever of the CiraNet Portals you want to use next time.
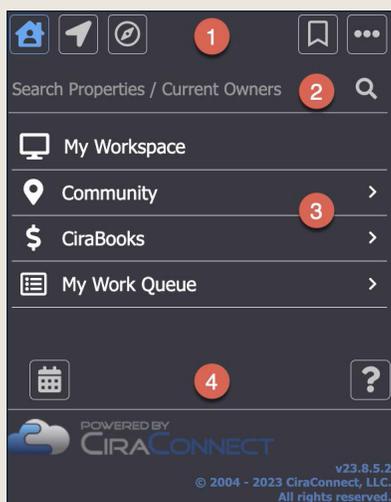
Navigation Pane

The navigation pane is your menu to the different modules available to you as a community executive in the Management/Board Portal. We will take a high-level view of how to use it to find what you need.
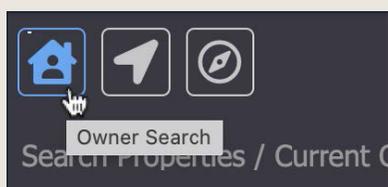
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Navigation Pane

1. Navigation Header. The icons along the top of the pane help you find the items you want to work on. The active option will appear blue.

Owner Search. This allows you to use the Quick Search to find specific addresses or owners within your community. The results pop up in a floating window[1] and disappear after you navigate away from the page.

Community. Clicking here will take you back to the Community Landing page.

Navigation Search. This tool allows you to find any of the pages available to you in the Management/Board Portal. As an example, if you are wanting to search the paid invoices from the Search Invoices tool, type in "Invoices" in the Quick Search to see all the options with that key word in the page title and click on the one you want.

Bookmark. This allows you to bookmark pages you use often and want to be able to access again quickly.

Side Navigation. Clicking here opens a side-view that extends out horizontally of the Navigation Pane with quick access to any of the sub-nodes available under the main categories.
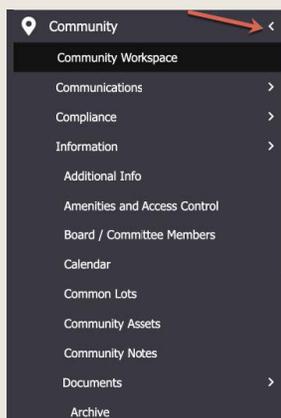
[1] Be sure to set your browser to allow pop-ups from CiraNet.

Hovering over these icons with your mouse will display a tooltip indicating what the icon is for.

Management Portal Login and Navigation for Executive Users
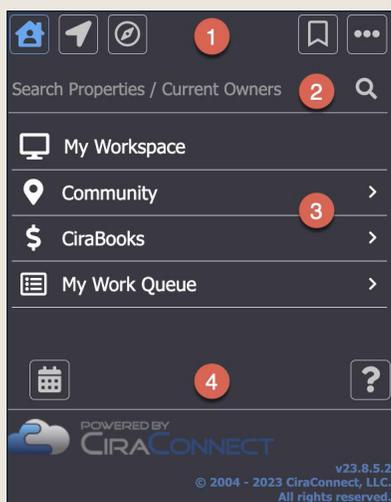
[1] These modules may also be referred to as **primary nodes** or **sub-nodes** / **child nodes**.

Navigation Pane

2. Quick Search. You can use this to search for either owner/properties or to search the navigation Pane. The title in the search line will let you know what it is currently set to search for. In this example, the user property icon for a property or owner search is active.

3. Main Tree. The main part of the Navigation Pane consists of a tree-structured menu. When you click on the main module you want to explore it will open the branches[1] of your selected option, or it will open the selected page if there are no branches.

4. Navigation Footer. The options available along the footer can differ depending on which page you are on. The footer options are as follows:

Advanced Search. This option opens the Search tool, allowing you to search for owners (current and former), workflows, invoices, vendors, and much more.

Contact Us. This is your support hub - but please work through your Community Association Manager for any questions or concerns as your primary poiint of contact.
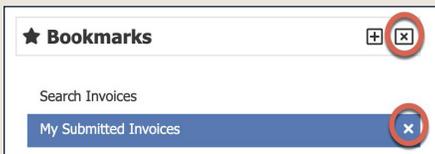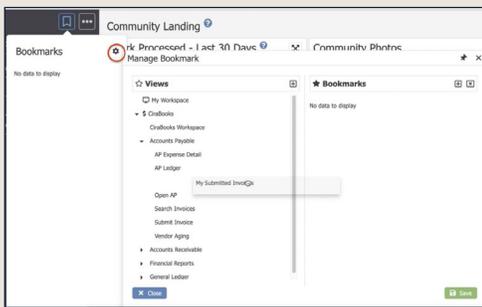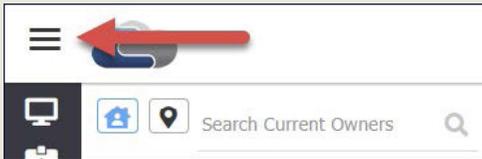
Calendar. This opens your community calendar.

Help. This opens the primary CiraHelp page where you can search for help pertaining to any of the CiraNet portals.

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Hide Menu

At the top left of the Navigation Pane is a collapse menu icon (commonly known as a "hamburger icon"). Using this will grant you a little more screen space for the page you are working in. A top bar menu may appear when the side bar is collapsed, depending how you have set up your preferences.

Bookmarks

As we touched on before, bookmarks are an excellent way to collate pages you routinely use. When you open the Management/Board Portal for the first time, the ribbon icon is empty, indicating no bookmarks. This will fill in once you have at least one page bookmarked.

Managing your bookmarked pages is a quick process. To begin, click on the ribbon to open the blank pane. The gear icon will open a menu of pages you can bookmark. Find the one(s) you want quick access to and drag them over to the right side of the pane. Once you have bookmarked as many pages as you like, save your bookmarks. Bookmarked pages will now show up when you click on the bookmark icon.

If you need to reshuffle and want to remove one or more bookmarks, click the "x" icon next to the bookmark(s) you want to remove. If you want to remove all of them, there is an "x" in the top right corner you can use to do so.

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TIP SHEET

[1] Make sure your browser is up-to-date, and be aware that your browser may function more slowly if you are sharing internet bandwidth with others

CiraMobile is available for free download in the Apple App Store, and can be used on both tablets and iPhones. The CiraMobile App can be found here:

An Android version of CiraMobile is available, but may have limited functionality depending on your task.

[2] When navigating back to CiraNet, type "ciranet.com" into your broswer address bar. If you use a bookmark or "recently visited" link to return to CiraNet the link may include an old session ID, which could be the issue.

A Bit About Browsers

Working in the Cloud means you can access CiraNet no matter where you are or what computer you are using, but browsers will differ slightly. CiraNet is supported on Google Chrome, Microsoft Edge, Mozilla Firefox, and Safari browsers.[1]

If you experience technical issues while using CiraNet, try these preliminary self-help options:
→ Hard refresh (Cmd+Shift+R or Ctrl+F5) the page to clear your browser cache and reload the page.
→ Clear your browser cache and cookies:
  • **Chrome**: https://support.google.com/accounts/answer/32050
  • **Firefox**: https://support.mozilla.org/en-US/kb/how-clear-firefox-cache
  • **Edge**: https://support.microsoft.com/en-us/help/10607/microsoft-edgeview-delete-browser-history
  • **Safari**: https://support.apple.com/en-us/HT201265
→ Close your browser(s) and start a new browsing session.[1]
→ Restart your computer.

If those steps fail, please let your Community Association Manager know right away. The following information will help us troubleshoot the issue much faster:
→ Walk us through the steps you have taken to navigate to the point of error in as much detail as possible.
→ What error messages, if any, have you received.
→ Describe the unexpected outcome you arrived at.
→ Provide a screenshot of the error if possible. Please include the entire screen in the image, including URL search bar.
→ Identify the environment you were working in. Let us know if you were on a mobile device, PC, or a Mac, browser (and browser version) you were using, zoom levels, etc.

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TIP SHEET

Additional Resources

To learn more about using the Management/Board Portal, please refer to these other resources:

→ ARC/ACC Application Approval Tip Sheet
→ Approving Past Due Accounts Tip Sheet (link coming soon)
→ Approving Payables Tip Sheet (link coming soon)
→ Using Management Portal Workspaces Tip Sheet (link coming soon)

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