The pages listed below have a subset of instructions from ParishSOFT. They are found in a document called psSyncMgmt_for_Parishes_Pub11R1.pdf, pages 10 to 12. The pages describe how to add people to the staff management list. Some things to note:

- Page 10 step 2b and 2c talks about clicking on a button called "Create new" from the search screen. This button was taken out in a previous release.
 - If you can't find the person, you need to create a new family that will include this person. In order for this new person to show on the list the person needs to have a Member DUID that is not zero. Typically it takes about 30 minutes for the sync to populate this number. The Member DUID can be checked on by going into the "Edit/View Sacramental Details" for that member. Once the Member DUID is no longer 0 then the person can be added to the staff management list.
- Page 10 step 4 talks about SS Num. We do not collect SS numbers so please do not fill that out.
- Page 11 step 6 talks about position. If the person in the staff list needs to show on the kenedy directory then their position needs to be listed below:
 - Priest Moderator, Pastor, Administrator, Pastoral Coordinator, Parochial Vicar, Priest Minister, Deacon, In Residence, D.C.M., C.C.M., C.C.M. – English, C.C.M. – Spanish, C.C.M. - Vietnamese
- Page 11 step 8:
 - The "**Primary Assignment**" box may or may not have a check in it. The check depends on an assignment somewhere else. Leave this to what ever the default is.
 - The "Grant Login Privileges" box only needs to be checked if they need rights to use the software.
 - The "**Show In Kenedy Dir.**" box should be unchecked for all new people being added to the staff management except the following:
 - The only names that need to be checked are all Priests (including inresidence priests), Deacons, Pastoral Coordinators (if applicable), DCMs and CCMs. People with these titles are the only ones that go in the OCD.
 - If there is a question about this please contact Angelica Alba at (909) 475-5143.

If there are questions or errors that come up as you are entering in this data please call ParishSOFT at 1-866-930-4774 or e-mail <u>support@parishsoft.com</u> or call Eric Kuske at the Pastoral Center (909) 475-5403 (ekuske@sbdiocese.org) to resolve before continuing.

When Firewall Prevents Sync Process

ParishSOFT uses the following ports:

Port 21 - FTP Port 25 - Mail/SMTP Port 80 - WWW/HTTP Port 254 - WAN Port 443 - SSL/HTTPS

Manage Staff List, Set Up Users

Use this procedure to add staff, grant login rights, and grant access rights to designated areas in your ParishSOFT database.

You must be an **Organization Administrator** in your parish database to add or edit staff.

 From your ParishSOFT Family Directory Module, click Staff menu > Manage Staff List.



2. The *Staff Management* screen will open and display the staff members currently set up in your ParishSOFT database.

Name	EMail	Suffix	Primary Pos	
Contra Sheila	sheil: 3 com		Office Mana	
Fr. Chuck			Pastor	Add User
Fr Charles	c' s@alloom		Pastor -	-
Gladys			CCW Presic	Edit User
P iii Jacquie	jroop@oon net		Catechetica	Lakosei
F Deacon Stephe	n		Deacon	<u>R</u> emove User
			>	Sync Changes

a. Click the **Add User** button. The *Add New Persons* screen will open.

b. Type the last name of the person and click the **Search** button. If the search finds the person in the database, select his name and click the **Accept** button. If the person's name is not found, click **Create New**.

Prefix	Last Name	First Na	ame Middle	Suffix
-	Abbey	William		
Date of Birth	8/6/59 Gen	der M 💌 G	oes by	
Primary Email A	Address Maider	n Name	- 🛛	

- c. On the *Add New Person* screen, choose a **Prefix** or select the "blank" option from the lookup table. Tab through each field entering data as you go. Click **Create** to save.
- 3. The *Assignment/Position Details* screen will open (your diocese can view this same screen from its ParishSOFT database).

Additional Person Status Information Catholic Chr Login Username Catholic You Abheu William Department	Abbey Access Rights Notes etails City State F f Information Technology Toledo OH C Vermilion IL F hand School Services Toledo OH F
Selected Assignment: Office of Ethics & Integrity: unknown Cogin Username Adbitional Person Status Information Login Username Abbey_William Reset SS Num Password Email Password Email Password Email Password Email Password Email PoP3 Server	etails City State F of Information Technology Toledo OH C nicle Vermition IL E h and School Services Toledo OH F
Office of Ethics & Integrity: unknown Additional Person Status Information Department Catholic Chin Catholic Chin Cath	City State F of Information Technology Toledo OH C unicle Vermilion IL E th and School Services Toledo OH F
Additional Person Status Information Login Username Abbey, William SS Num Email Address william@aol.com Email Password Email Password Email PoP3 Server	of Information Technology Toledo OH C micle Vermilion IL E th and School Services Toledo OH F
Email POP3 Server	if Information Technology Toledo OH u cs & Integrity Dexter MI u
Add Additional	d Screen Disable/End Date

- 4. Enter a Login Username, Social Security (SS Num), Email Username, Email Password, and Email POP3 Server (or Email Outbound).
- 5. Click the **Update** button.



- 6. Click the **Positions** tab and check the position(s) that the member will hold in the organization.
 - a. Click to place a checkmark in the primary position.
 - b. Click the ^ button to promote it to the top of the list.
 - c. Uncheck the *unknown* position.
 - d. Click **Yes** to remove the Unknown position from the person's assignment record.

Active	Mr.	Positions	Abbey Access Rights	Notes
Selected Assignme Office of Ethics & Edit Position Unknown Org Directory Order: Position Notes:	Integrity; unknov	 Inew] Admin Adduit Atar 8 Assoc BeFrie Bera Bookl Busin Cemel Chapl 	or I Assist istrator Education & Rosary iate Pastor ender Ministry wed keeper ess Manager teries ain Director	Order (Top is Primay)
Add Additional Assignments		Upda	ate	Close Cano

- 7. Click the **Access Rights** tab.
- 8. Check the Grant Login Privileges box.
- 9. Click the ParishSOFT Modules tab. Use the Select All button or check individual boxes to give the user privileges as needed to Family Directory, Contributions/Pledges, Time & Talent, and Religious Ed. Uncheck a box to remove a privilege. See Privileges for Users in your ParishSOFT user guides for guidance on assigning access rights to users.
- 10. Click **Close** to save and exit.
- 11. On the *Staff Management* screen, click the **Sync Changes** button to update your local database with the diocesan database.

Assignment/Position D Assignments: Person ID: 48 Status Prefix Active Mr.	3088	Name Last Nam	e Suffix			
Assignments	Positions	Access Rights	Notes			
Selected Assignment: St John Baptist Parish (Lande		Administrator	Primary Assignment Grant Login Privileges			
Start 12-18-2007 End Date	Assign	ment 🔪 👝	Show In Kenedy Dir. Edit/View Pastoral Notes			
Discessan Directory & Web Solutions ParishSOFT Modules						
Parish Administrator Select All						
Family Directory	Contributions/Pledges	⊂ Time & Talent	Religious Ed			
I♥ View	Edit/Add	IV Edit/Add	IV View IV Edit/Add			
I Delete	✓ Delete	Delete	✓ Delete			
🔽 Print	🔽 Print	🔽 Print	🔽 Print			
	View Giving History					
	Edit Bank Accounts					
Add Additional Assignments Update Cancel						

Disable User Privileges

Check the **Assignment Disabled** box to revoke a user's login privileges. The assignment **End Date** will populate with today's date. Click **Update** to save your changes.

A user with a disabled assignment cannot log in to any ParishSOFT applications, including the Safe Environment Program Manager (if applicable to your parish) from a web browser.

Disable privileges for any employee or volunteer who leaves your organization.

Assignment/Position Details					
Status Pref			Suffix		
Active Mr.	▼ William	Abbey			
Assignments	Positions	Access Rights	Notes		
Selected Assignment: St John Baptist Parish (Landeck); Bus					
Start Date Determined					
Diocesan Directory & Web Solutions ParishSOFT Modules					
Parish Administrator Select All					
- Family Directory	Contributions/Pledges		Religious Ed		
View	View	View	View		
I Edit/Add I Delete	I Edit/Add I Delete	I Edit/Add I Delete	I Edit/Add I Delete		
	Print	10			
l Print	View Giving History	🔽 Print	✓ Print		
	Edit Bank Accounts				
Add Additional Update Close Cancel					

