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	
C Sheila	sheil: 3' com		Office Mana	
Fr. Chuck			Pastor	Add User
Fr Charles	ci s@aticom		Pastor -	
Gladys			CCW Presic	EditUser
F iii Jacquie	jroop@oon net		Catechetica	Edit Osei
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 Name	Middle Suffix
-	Abbey	William	
Date of Birth	8/6/59 Gende	er M 💌 Goes	by
	ddroso Maidon I	lama.	

- 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).

Assignment/Position Details		
Assignments: Person ID: 48088 Status Prefix Middle Active  Mr.	First Name         Last Name           William         Abbey	Suffix
Assignments Position:	Access Rights	Notes
Selected Assignment:	Assignment Details	
Office of Ethics & Integrity: unknown   Additional Person Status Information Login Username  Abbey_William  Reset SS Num  Password  Email Address  Email Username  Email Password  Email Password	Organization Department of Information Technolo Catholic Chronicle Catholic Youth and School Services Department of Information Technolo Office of Ethics & Integrity	City         State         F           rgy         Toledo         OH         C           Vermilion         IL         E         Toledo         OH         F           rgy         Toledo         OH         F         OH         C           p         Toledo         OH         F         OH         C           Dexter         MI         0         OH         C
Add Additional Assignments	Background Screen Disabl	e/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.

	Mr.	Positions	Access Bights	Notes
Selected Assignme Office of Ethics & Edit Position Unknown Org Directory Order Position Notes:	ent: Integrity; unknowr	Positions I Directo Admin Admin Admin Adult E Atar & BeFreat Bereat Bereat Chapte Chapte Choir D Compu	Detail Assist strator ducation Rosary ate Pastor nder Ministry ved eeper ss Manager eries sin Director ters	Order (Top is Primay)
Add Additional		Upda	te	

- 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: 44 Status Prefit Active Mr.	etails 3088 x Middle First I	Name Last Nam	e Suffix		
Assignments	Positions	Access Rights	Notes		
Selected Assignment:           Backgrd Screening Purileges         Primary Assignment           St John Baptist Parish (Landeck); Bus         Global Administrator         Grant Login Privileges					
Start 12-18-2007 End Date Assignment Disabled					
- Diocesan Directory	Discessan Directory & Web Solutions     ParishSOFT Modules				
Parish Administrator Select All					
Family Directory	Contributions/Pledges	Time & Talent	Religious Ed		
I♥ View	Edit/Add	Edit/Add	Edit/Add		
I Delete	✓ Delete	<b>I</b> Delete	✓ Delete		
🔽 Print	🔽 Print	🔽 Print	🔽 Print		
	View Giving				
	Edit Bank Accounts				
Add Additional Assignments	Upd	ate			

## **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 Prefix Middle First Name Last Name Suffix					
Active Mr. Mr. Abbey					
Assignments	Positions	Access Rights	Notes		
Selected Assignment:       Backgrd Screening Privileges       Image: Constraint of the second					
Start 12-18-2007 End Assignment Show In Kenedy Dir.					
Diocesan Directory & Web Solutions ParishSOFT Modules					
Parish Administrator Select All					
Family Directory	Contributions/Pledges	Time & Talent	Religious Ed		
View	View	View	View		
Edit/Add	Edit/Add	Edit/Add			
	Delete	Delete			
jœ rinti	View Giving	je Fink	j <b>∞</b> rink		
	Edit Bank Accounts				
Add Additional Update Close Cancel					

