

Diocese of San Bernardino
How to Add People to Staff Management List
ParishSOFT Software

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 in-residence 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 support@parishsoft.com or call Eric Kuske at the Pastoral Center (909) 475-5403 (ekuske@sbdioocese.org) to resolve before continuing.

When Firewall Prevents Sync Process

ParishSOFT uses the following ports:

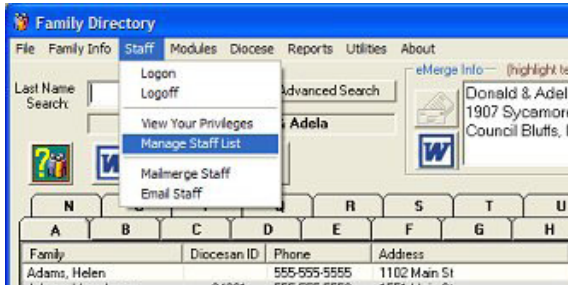
- Port 21 - FTP
- Port 25 - Mail/SMTP
- Port 80 - WWW/HTTP
- Port 254 - WAN
- Port 443 - SSL/HTTPS

Manage Staff List, Set Up Users

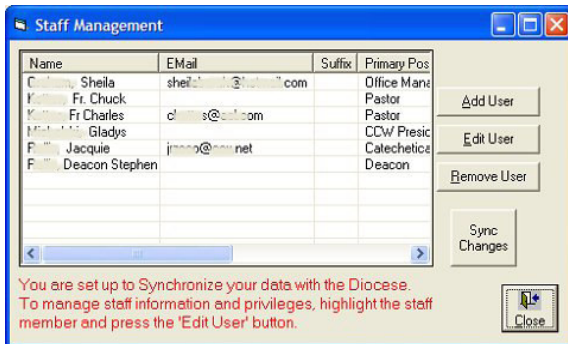
Use this procedure to add staff, grant login rights, and grant access rights to designated areas in your ParishSOFT database.

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

1. 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.

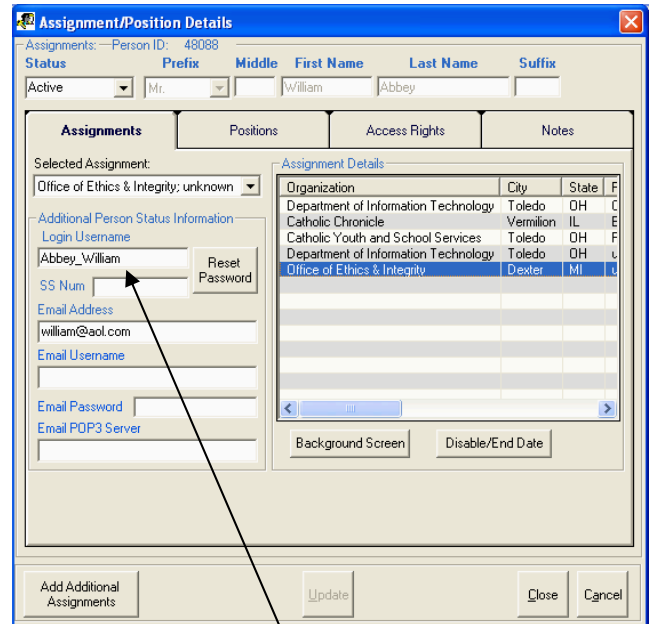


- a. Click the **Add User** button. The *Add New Persons* screen will open.

- 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**.



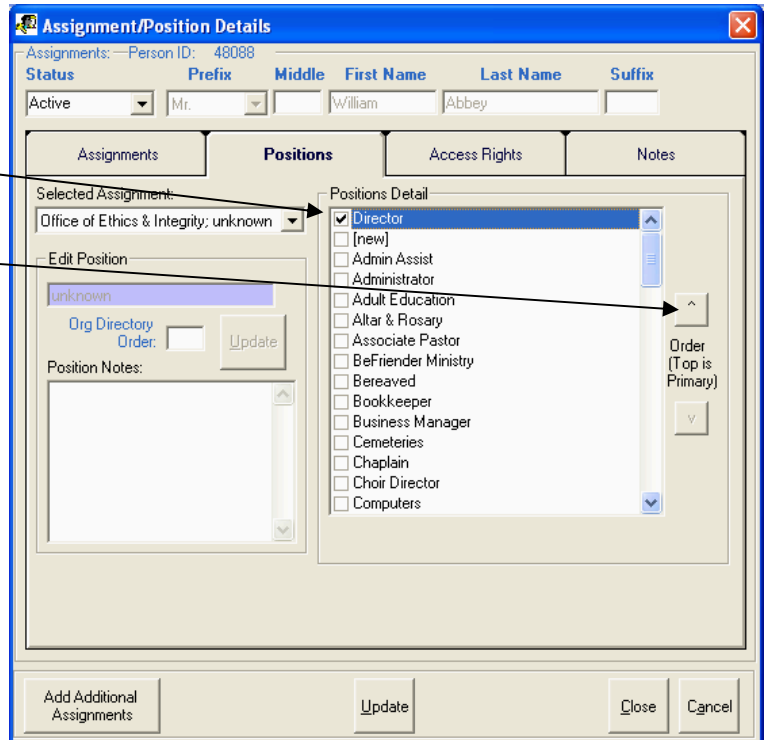
- c. On the *Add New Person* screen, choose a **Prefix** or select the “blank” option from the lookup table. Tab through each field entering data as you go. Click **Create** to save.
3. The *Assignment/Position Details* screen will open (your diocese can view this same screen from its ParishSOFT database).



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.

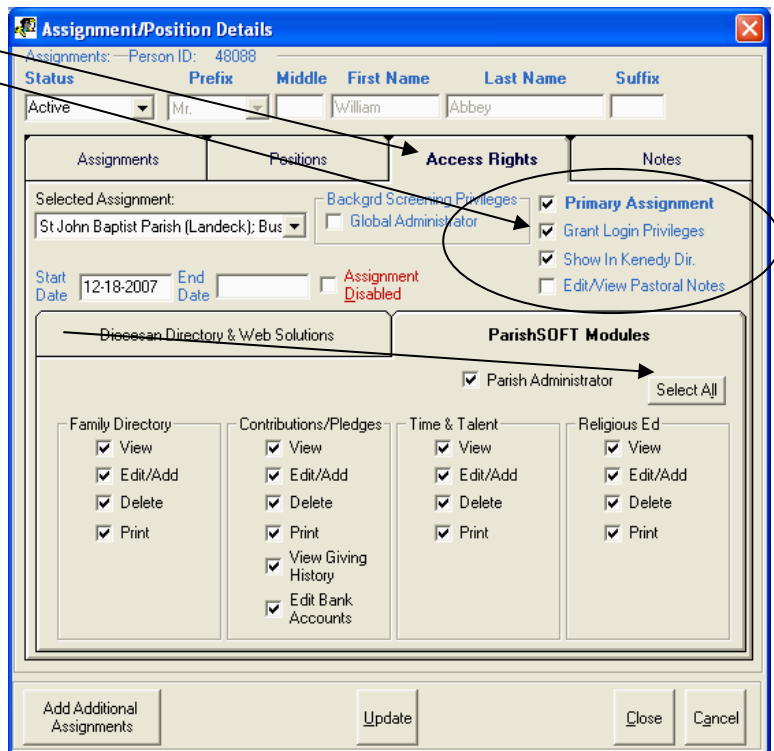
6. Click the **Positions** tab and check the position(s) that the member will hold in the organization.

- Click to place a checkmark in the primary position.
- Click the ^ button to promote it to the top of the list.
- Uncheck the *unknown* position.
- Click **Yes** to remove the Unknown position from the person's assignment record.



- Click the **Access Rights** tab.
- Check the **Grant Login Privileges** box.
- 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.

- Click **Close** to save and exit.
- On the *Staff Management* screen, click the **Sync Changes** button to update your local database with the diocesan database.



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.

The screenshot shows the 'Assignment/Position Details' window for Person ID 48088, William Abbey. The 'Status' is 'Active'. The 'Selected Assignment' is 'St John Baptist Parish (Landeck); Bus'. The 'Access Rights' section is expanded, and the 'Assignment Disabled' checkbox is checked. The 'End Date' field is highlighted with a red circle and an arrow pointing to it from the text above. The 'ParishSOFT Modules' section is also expanded, showing various permissions checked for 'Parish Administrator'.