

# | Administration

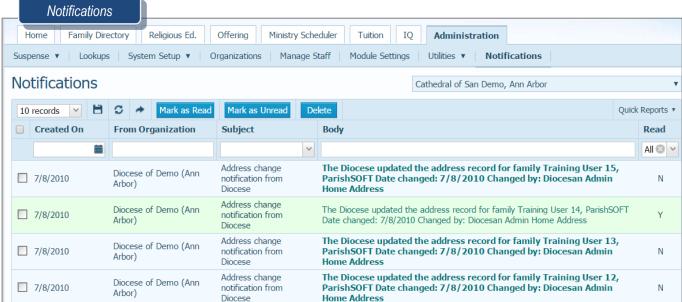
#### Menus in the module

Suspense, Lookups, System Setup, Organizations, Manage Staff, Module Settings, Utilities, Notifications

- Suspense allows you to review, approve and deny My Own Church user changes
- Lookups allows for customizing tables and tracked data fields (i.e. celebrants and buildings/rooms)
- Manage Staff allows you to set up and edit staff logins
- Module Settings allows you to edit functionality of the modules themselves
- Notifications alerts you to changes made to family records in your organizations and allow you to approve or deny changes

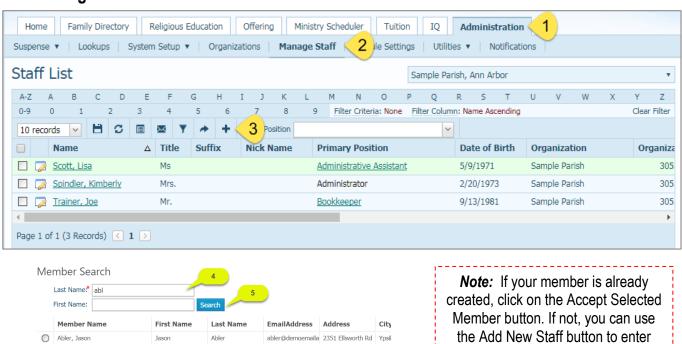






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## Adding a staff member



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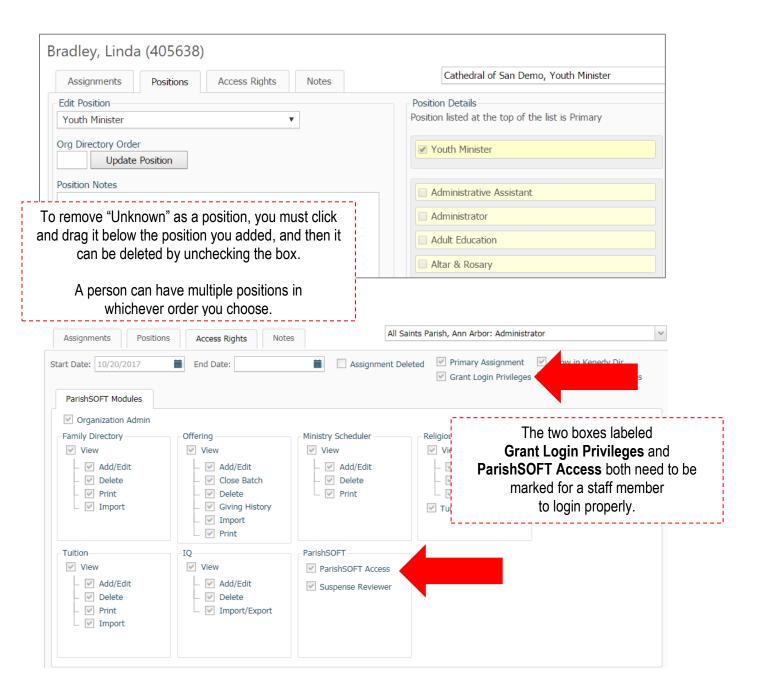
created, click on the Accept Selected Member button. If not, you can use the Add New Staff button to enter them into the database, but be sure to Save & Edit, then click on Autofill Family Names to properly save them into the system.

Assignments	Positions	Access Righ	nts Notes	Cath	nedral o
Additional Informa	tion		Assignments Detail	s	
Username.*			Pri. Assignment	Organization	City
SS Num:			<b>⋖</b>	Cathedral of San Demo	Ann A
Email Address.*	mail Address.* BradleyLinda @demoema		1 of 1 (1 Assignments) 🕢 1 🕥		
mail Username:					
Email Password:					
Outgoing Mail Server:					
	Reset Passwor	·d			
Add Assignment					
Add Additional Ass	signment				
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User name and Email address are the only items that need to be filled out on this page.

Username is usually: Lastname\_Firstname

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# Add New Staff Assignment exercise

- 1. Click on + to add Staff
- 2. Type in the last name and Click **Search**
- 3. Click on the **radio button** next to your name
- 4. Choose Accept
- 5. Click on **OK**

# **Assignments**

- 1. Click Edit Details
- 2. Type in username, your name as: firstname\_lastname
- 3. Type in email address: note if it's already in the member record, it will be pre-populated
- 4. Click Save

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#### **Positions**

- 1. Click on the **checkbox** next to Administrator
- 2. Click on the **checkbox** next to unknown (note results)
- 3. Click and Drag Administrator above Unknown
- 4. **Uncheck** check box next to Unknown (note results)

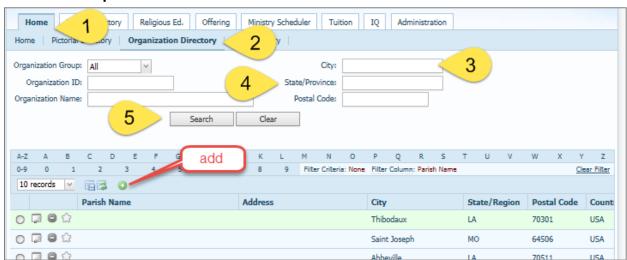
### **Access Rights**

- 1. Primary Assignment must be checked
- 2. Grant Login Privileges must be checked
- 3. Connect now Access under Suspense Review must be checked.

## **Organization Admin**

- 1. Checking this box will mark all boxes below
- 2. The Organization Admin is the only one who can
  - a. Give Staff Assignments
  - b. Has Fund Permissions
  - c. Has the Administration Tab

## How to add a parish not in the United States



#### QUESTIONS FROM CLASS

- 1. When adding a new staff member, why do I never click on the Add New Staff button?
- 2. To add a celebrant, I go to the \_\_\_\_\_ tab
- 3. To add a parish, I go to the \_\_\_\_\_ tab
- 4. To see a change of parish registration, I go to the

#### **TIPS & TRICKS**

- Remember to drag the "Unknown" staff position down in the list before unchecking to remove it
- The Organization Directory on the Home tab allows you to "star" organizations as favorites
- Staff username setup is up to you, but may be regulated by your diocese

#### **ANSWER KEY**

The Add New Staff button creates an orphan record. Use the Accept button instead. 2. Lookups
Home, then Organization Directory 4. Notifications

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