

## 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



**Notifications**

Home | Family Directory | Religious Ed. | Offering | Ministry Scheduler | Tuition | IQ | **Administration**

Suspense | Lookups | System Setup | Organizations | Manage Staff | Module Settings | Utilities | **Notifications**

Notifications Cathedral of San Demo, Ann Arbor

10 records | [Save] | [Refresh] | [Mark as Read] | [Mark as Unread] | [Delete] | Quick Reports

Created On	From Organization	Subject	Body	Read
7/8/2010	Diocese of Demo (Ann Arbor)	Address change notification from Diocese	<b>The Diocese updated the address record for family Training User 15, ParishSOFT Date changed: 7/8/2010 Changed by: Diocesan Admin Home Address</b>	N
7/8/2010	Diocese of Demo (Ann Arbor)	Address change notification from Diocese	The Diocese updated the address record for family Training User 14, ParishSOFT Date changed: 7/8/2010 Changed by: Diocesan Admin Home Address	Y
7/8/2010	Diocese of Demo (Ann Arbor)	Address change notification from Diocese	<b>The Diocese updated the address record for family Training User 13, ParishSOFT Date changed: 7/8/2010 Changed by: Diocesan Admin Home Address</b>	N
7/8/2010	Diocese of Demo (Ann Arbor)	Address change notification from Diocese	<b>The Diocese updated the address record for family Training User 12, ParishSOFT Date changed: 7/8/2010 Changed by: Diocesan Admin Home Address</b>	N

# Adding a staff member

Home | Family Directory | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | **Administration** 1

Suspense | Lookups | System Setup | Organizations | **Manage Staff** 2 | File Settings | Utilities | Notifications

### Staff List

Sample Parish, Ann Arbor

A-Z | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

0-9 | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Filter Criteria: None | Filter Column: Name Ascending | Clear Filter

10 records | [Print] | [Refresh] | [Export] | [Import] | [Add] 3 | Position: [Dropdown]

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organiz
<input type="checkbox"/> <a href="#">Scott, Lisa</a>	Ms			<a href="#">Administrative Assistant</a>	5/9/1971	Sample Parish	305
<input type="checkbox"/> <a href="#">Spindler, Kimberly</a>	Mrs.			<a href="#">Administrator</a>	2/20/1973	Sample Parish	305
<input type="checkbox"/> <a href="#">Trainer, Joe</a>	Mr.			<a href="#">Bookkeeper</a>	9/13/1981	Sample Parish	305

Page 1 of 1 (3 Records) | < 1 >

### Member Search

Last Name:  4  
 First Name:  5

Member Name	First Name	Last Name	EmailAddress	Address	City
<input type="radio"/> Abler, Jason	Jason	Abler	abler@demoemai	2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Tracey	Tracey	Abler	cmann@parishsoft.	2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Griffin	Griffin	Abler		2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Parker	Parker	Abler		2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Spencer	Spencer	Abler		2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Parker	Parker	Abler		2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Griffin	Griffin	Abler		2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Tracey	Tracey	Abler	cmann@parishsoft.	2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Jason	Jason	Abler	abler@demoemai	2351 Ellsworth Rd	Ypsil
<input type="radio"/> Abler, Spencer	Spencer	Abler		2351 Ellsworth Rd	Ypsil

Page 1 of 16 (160 Records) | < 1 2 3 4 5 6 7 ... 14 15 16 > 6

**Note:** If your member is already 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.

### Bradley, Linda (405638)

Assignments | Positions | Access Rights | Notes | Cathedral of

#### Additional Information

Username:

SS Num:

Email Address:

Email Username:

Email Password:

Outgoing Mail Server:

Add Assignment

#### Assignments Details

Pri. Assignment	Organization	City
<input checked="" type="checkbox"/>	Cathedral of San Demo	Ann A

1 of 1 (1 Assignments) | < 1 >

User name and Email address are the only items that need to be filled out on this page.

Username is usually: Lastname\_Firstname

Bradley, Linda (405638)

Assignments Positions Access Rights Notes Cathedral of San Demo, Youth Minister

Edit Position  
Youth Minister

Org Directory Order  
Update Position

Position Notes

Position Details  
Position listed at the top of the list is Primary

- Youth Minister
- Administrative Assistant
- Administrator
- Adult Education
- Altar & Rosary

To remove "Unknown" as a position, you must click and drag it below the position you added, and then it can be deleted by unchecking the box.

A person can have multiple positions in whichever order you choose.

Assignments Positions Access Rights Notes All Saints Parish, Ann Arbor: Administrator

Start Date: 10/20/2017 End Date:

Assignment Deleted  Primary Assignment  Grant Login Privileges

ParishSOFT Modules

- Organization Admin
  - Family Directory
    - View
      - Add/Edit
      - Delete
      - Print
      - Import
  - Offering
    - View
      - Add/Edit
      - Close Batch
      - Delete
      - Giving History
      - Import
      - Print
  - Ministry Scheduler
    - View
      - Add/Edit
      - Delete
      - Print
  - Religious
    - View
    - Tuition
- Tuition
  - View
    - Add/Edit
    - Delete
    - Print
    - Import
- IQ
  - View
    - Add/Edit
    - Delete
    - Import/Export
- ParishSOFT
  - ParishSOFT Access
  - Suspense Reviewer

The two boxes labeled **Grant Login Privileges** and **ParishSOFT Access** both need to be marked for a staff member to login properly.

**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**

## 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

The screenshot shows the 'Organization Directory' interface. Callout 1 points to the 'Home' tab. Callout 2 points to the 'Organization Directory' tab. Callout 3 points to the 'City' input field. Callout 4 points to the 'Organization ID' input field. Callout 5 points to the 'Search' button. A red box labeled 'add' is positioned over the 'Add New Staff' button in the table toolbar.

Parish Name	Address	City	State/Region	Postal Code	Count
		Thibodaux	LA	70301	USA
		Saint Joseph	MO	64506	USA
		Abbeville	LA	70511	USA

### 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 \_\_\_\_\_ tab

### 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

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