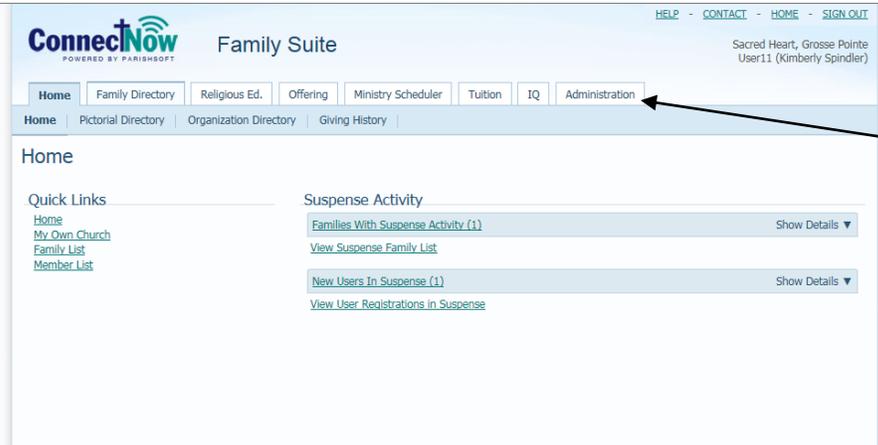
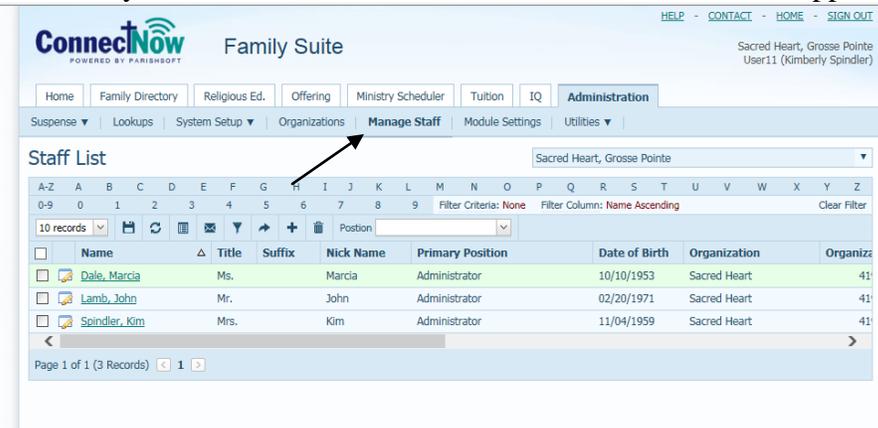


Setting up Staff in Connect Now

1. You must be an administrator in the Connect Now platform to create other staff members and login accounts. First login to Connect Now. You should be able to see the **Administration** tab as seen below.



2. Click on the **Administration** tab, then on the **Manage Staff** area in the blue options directly below the **Administration** tab. The screen should appear similar to below:



3. Click on the plus sign in the blue icon area and you will have the basic **Find Member** search screen, as seen below. Enter in at least a last name for the staff member you wish to add and possibly their first name too, if they have a common last name.

The screenshot shows the Find Member search screen. It has a form with the following fields: Organization (dropdown menu set to All), Last Name (text input), First Name (text input), and City (text input). There is a Search button and an Add New Member button at the bottom.

4. Click **Search** and you will be able to see different members with the same names:

Member Search

Last Name: Johnson
 First Name: Catherine

Member Name	First Name	Last Name	EmailAddress	Address
<input type="radio"/> Johnson, Catherine	Catherine	Johnson	Demo@parishsoft.c	
<input type="radio"/> Johnson, Catherine	Catherine	Johnson	Demo@parishsoft.c	
<input type="radio"/> Johnson, Catherine	Catherine	Johnson	Demo@parishsoft.c	

Page 1 of 1 (3 Records)

- If there is more than one listing for your person, please scroll over to the right to view the organizations which the member is affiliated with. In the example below, we would select the first listing of this member, and, as we're working in the "Demo" data we would select "Diocese of Demo". In the situation at your parish, you will most likely be selecting the member listed at your parish name.

Member Search

Last Name: Johnson
 First Name: Catherine

State	Home Phone	Birth Date	Organization	OrganizationID
	555-1234		Diocese of Demo	21021
	555-1234		Central Services	1580002
	555-1234		Diocesan Development	1580015

Page 1 of 1 (3 Records)

- Click the radial button on the far left side to select your member and then click the **Accept** button.

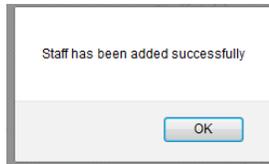
Member Search

Last Name: Johnson
 First Name: Catherine

Member Name	First Name	Last Name	EmailAddress	Address
<input type="radio"/> Johnson, Catherine	Catherine	Johnson	Demo@parishsoft.c	
<input type="radio"/> Johnson, Catherine	Catherine	Johnson	Demo@parishsoft.c	
<input type="radio"/> Johnson, Catherine	Catherine	Johnson	Demo@parishsoft.c	

Page 1 of 1 (3 Records)

- You will get a confirmation that the staff member was added.
*Note: If you don't see the staff member in the search list, then click the **Add New Staff** button which will take you to the member & family screen where you must first add in the member, then add in the member's family information.*



- You will see the following screen, which will allow you to set up a Username and verify the email of the member you are setting up. In the Diocese, for our staff, for convenience we are typically using Last Name_First Name. In the example below, the Username would be: Johnson_Catherine.

Johnson, Catherine (307861)

Assignments | Positions | Access Rights | Notes | Diocesan Development, 1

Additional Information

Username*:

SS Num:

Email Address*: Catherine@demoemail.com

Email Username:

Email Password:

Outgoing Mail Server:

Add Assignment

Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release Date
<input type="checkbox"/>	Central Services	Ann Arbor	41	8/13/2004	8/17/2007
<input checked="" type="checkbox"/>	Diocesan Development	Ann Arbor	1	8/13/2004	11/26/2007
<input type="checkbox"/>	Diocese of Demo	Ann Arbor	97	4/12/2007	
<input checked="" type="checkbox"/>	Good Shepherd Parish	Toledo	22	3/23/2017	

1 of 1 (4 Assignments) < 1 >

- Click the **Edit Details** button, then type in the correct Username into the screen.

Johnson, Catherine (307861)

Assignments | Positions | Access Rights | Notes | Diocesan Development, 1

Additional Information

Username*: Johnson_Catherine

SS Num:

Email Address*: Catherine@demoemail.com

Email Username:

Email Password:

Outgoing Mail Server:

Add Assignment

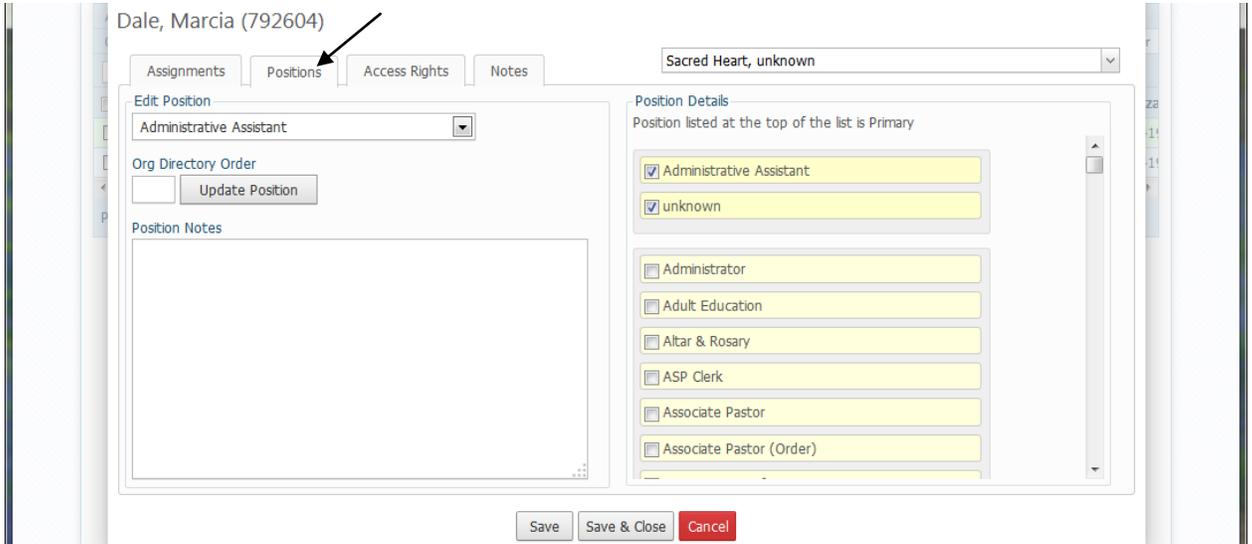
Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release D
<input type="checkbox"/>	Central Services	Ann Arbor	41	8/13/2004	8/17/2007
<input checked="" type="checkbox"/>	Diocesan Development	Ann Arbor	1	8/13/2004	11/26/2007
<input type="checkbox"/>	Diocese of Demo	Ann Arbor	97	4/12/2007	
<input checked="" type="checkbox"/>	Good Shepherd Parish	Toledo	22	3/23/2017	

1 of 1 (4 Assignments) < 1 >

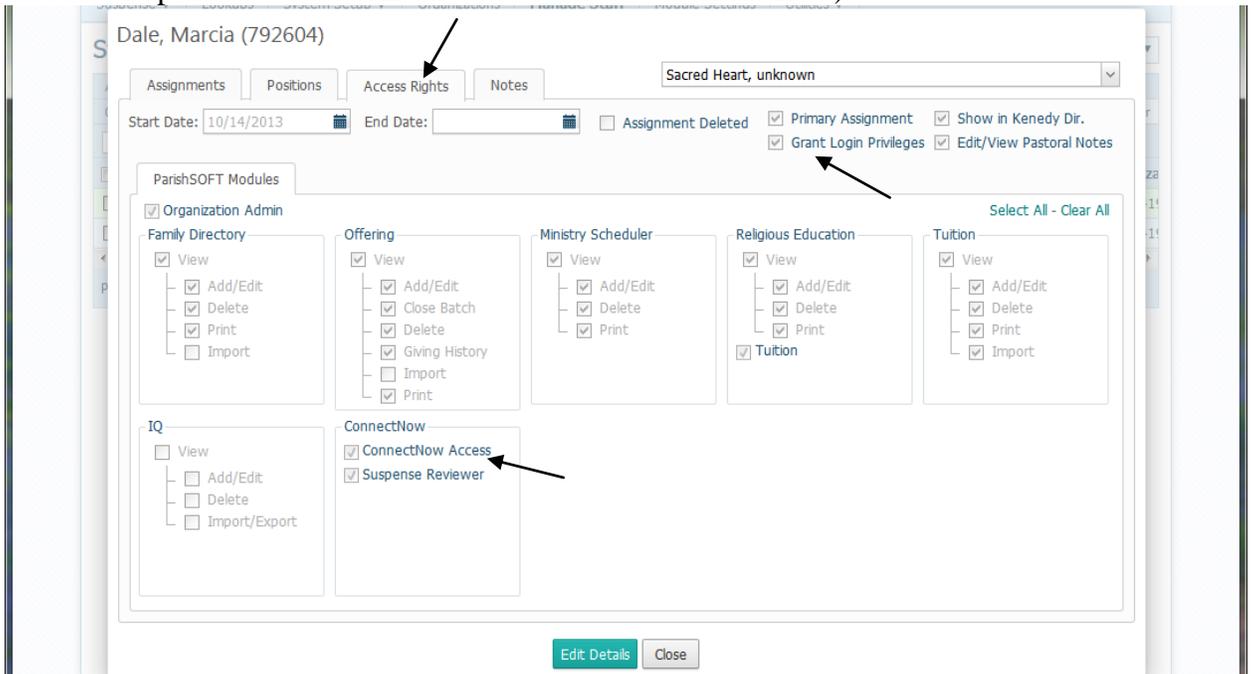
- Verify the staff member's email, as this email will be where their Username and temporary password is sent, along with a link to help them login. Click the **Save** button.
- Click the **Edit Details** button and click the **Reset Password** button. This will give you a confirmation that a new temporary password has been sent to this staff member at the above email address. Click **Save**.
- Next click on the **Position** tab. First click the **Edit Details**, then select the box in the list to **ADD** in another position (beyond the designation Unknown) which this staff member holds. You have to assign a different position before deleting the Unknown designation.

After checkmarking the new position from the list it will show up underneath the **Unknown** designation. Click on the new position name, HOLD down your mouse and drag the description to the area above the Unknown designation so that the new title is the first listed. (as seen below) Then, uncheck the **Unknown** position and it will be removed. Click **Save**.

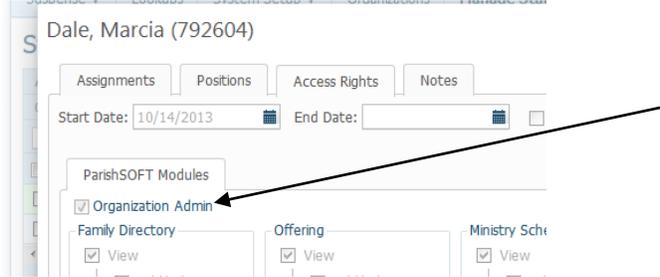


*Please note: You can't un-do the **Unknown** checkbox until you've assigned the staff member to another position.*

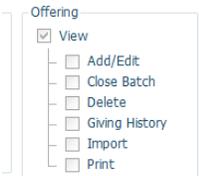
- Finally, click on the **Access Rights** tab for this staff member. Click **Edit Details** and assign the appropriate permissions for this user. (at a minimum, you must have **Grant Login Privileges**, **ConnectNow Access** and one other checkbox of a View under and area for the person to see ConnectNow screens as a staff member)



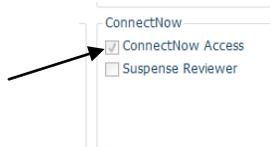
- a. The **Organization Admin** button should be assigned to one to two key users of the system. This setting allows those users to set up other staff members, see all funds in Offertory, etc. This is the highest access in the system.



- b. For each section, check or uncheck the boxes as it applies to each member. In the example below, under the **Offering** area, this staff member is allowed to view “some” Offering funds, which we will set up right after finalizing their overall staff setup.



- c. Under the **Connect Now** access box, you will need to check that the member is able to have **Connect Now access** as seen below:



- d. **Grant Login Privileges** also needs to be selected for the staff member to have a login into Connect Now. (There may be times when parishes wish to have a staff member listed, but not grant them a login.)



- e. When finished setting up this area, click **Save & Close**

14. You will now be back on the main **Manage Staff** screen and should be able to see the member listed there.

ConnectNow Family Suite

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

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

Staff List

Good Shepherd Parish, Toledo

Filter Criteria: None | Filter Column: Primary Position Ascending

Name	Title	Suffix	Nick Name	Date of Birth	Organization	Primary Position	Organiza
Johnson, Cathy	Ms.		Cathy		Good Shepherd Parish		15800
Abler, Sophie	Miss		Sophie	08/12/2014	Good Shepherd Parish		21
Adam, Kevin	Mr.		Kevin	02/06/1959	Good Shepherd Parish	1	21
Johnson, Michael	Mr.			01/01/1967	Good Shepherd Parish	1	21
Spindler, Kim	Mrs.		Kim	11/04/1959	Good Shepherd Parish	1	21

Finally... for all staff members with **Offertory** permissions, please follow the steps below to verify which funds they have permissions on.

- Click on the **Offering** tab, then go to the section directly underneath the tab in blue called: **Funds** You will see a screen similar to the one below:

ConnectNow Family Suite

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

Funds | Batches | Pledges | Posting | Contribution List | Giving History | Import | Reports | Settings

Fund Management

Good Shepherd Parish, Toledo

10 records | Add Fund | Fund Permissions

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
1131-10	Building Fund	19374	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
500-10-2013	Building Fund Campaign	19193	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
500-10-2015	Building Pledge 2015	19368	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2016-33	Capital Campaign 2016	19520	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
7	Capital Campaign 2017	19448	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	123
029-0	Confirmation	19367	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
5-5-2016	Easter	19447	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
1101	Envelope	19371	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
001-0	Envelope collection	19538	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
10-19-99	Festival 2016	19350	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Page 1 of 4 (36 Records)

- Click on the **Fund Permissions** seen above and you will see a screen similar to the one below:

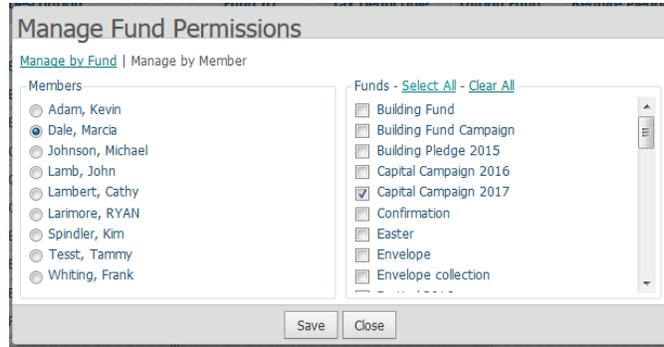
Manage Fund Permissions

Manage by Fund | Manage by Member

Funds	Members - Select All - Clear All
<input type="radio"/> Building Fund	<input type="checkbox"/> Adam, Kevin
<input type="radio"/> Building Fund Campaign	<input type="checkbox"/> Dale, Marcia
<input type="radio"/> Building Pledge 2015	<input type="checkbox"/> Johnson, Michael
<input type="radio"/> Capital Campaign 2016	<input type="checkbox"/> Lamb, John
<input type="radio"/> Capital Campaign 2017	<input type="checkbox"/> Lambert, Cathy
<input type="radio"/> Confirmation	<input type="checkbox"/> Larimore, RYAN
<input type="radio"/> Easter	<input type="checkbox"/> Spindler, Kim
<input type="radio"/> Envelope	<input type="checkbox"/> Tesst, Tammy
<input type="radio"/> Envelope collection	<input type="checkbox"/> Whiting, Frank

Save Close

- c. Click the **Manage by Member** link, as seen above
- d. Click the radial button next to the staff members you've added, then select or unselect the boxes for the funds on the right. Whichever box you've selected, the staff will be able to view/edit/etc. given the permissions you set on the original Staff Member's screens.



- e. In the example above, Marcia is our fundraiser for just the Capital Campaign going on at the parish. Instead of her asking key staff members for updated information, we've given her permission to view just that fund, when she's looking in the system.
- f. When finished editing all staff members with Offertory permissions, click the **Save** button.