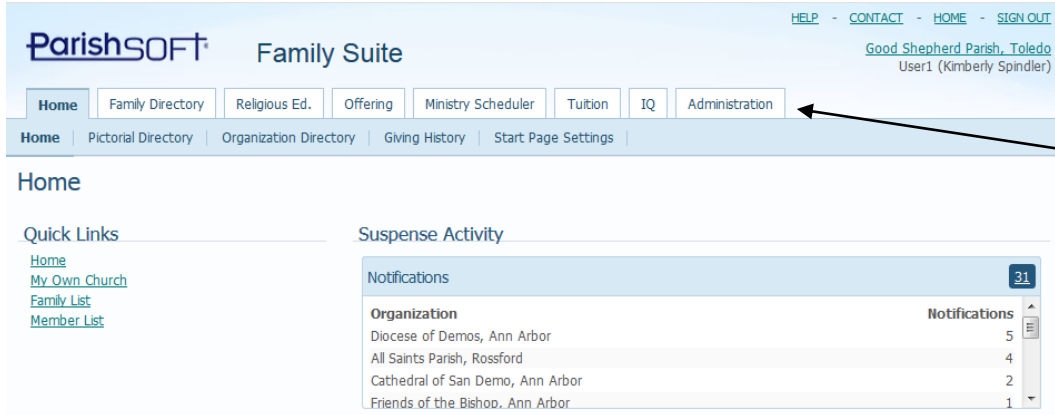


Setting up Staff in ParishSOFT

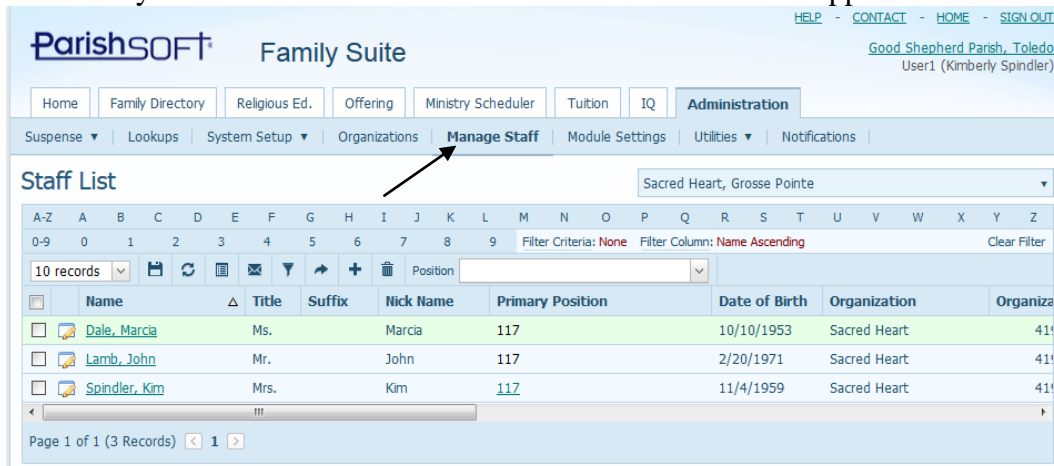
1. You must be an administrator in the ParishSOFT platform to create other staff members and login accounts. First login to ParishSOFT. You should be able to see the **Administration** tab as seen below.



The screenshot shows the ParishSOFT Family Suite interface. At the top, there are navigation links: HELP, CONTACT, HOME, and SIGN OUT. Below that, the user information is displayed: Good Shepherd Parish, Toledo, User1 (Kimberly Spindler). The main navigation bar includes tabs for Home, Family Directory, Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, and Administration. The Administration tab is highlighted with a blue background and an arrow pointing to it. Below the navigation bar, there are sections for Home, Quick Links, and Suspense Activity. The Suspense Activity section shows a table of Notifications for various organizations.

Organization	Notifications
Diocese of Demos, Ann Arbor	5
All Saints Parish, Rossford	4
Cathedral of San Demo, Ann Arbor	2
Friends of the Bishop, Ann Arbor	1

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:



The screenshot shows the ParishSOFT Family Suite interface with the Administration tab selected. Below the Administration tab, the Manage Staff option is highlighted with a blue background and an arrow pointing to it. The Manage Staff screen displays a table of staff members for the Sacred Heart, Grosse Pointe organization. The table has columns for Name, Title, Suffix, Nick Name, Primary Position, Date of Birth, Organization, and Organization ID. There are 10 records displayed, and the first three are visible.

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organization ID
Dale, Marcia	Ms.		Marcia	117	10/10/1953	Sacred Heart	411
Lamb, John	Mr.		John	117	2/20/1971	Sacred Heart	411
Spindler, Kim	Mrs.		Kim	117	11/4/1959	Sacred Heart	411

If you already have a staff member listed in this screen and just wish to send them a login with a temporary password, please go to step 14. on the last 2 pages of this document to “reset” their password and have their username and temporary password sent by email.

3. Click on the plus sign in the blue icon area and you will be taken to a basic search screen to find the member prior to adding them in as a staff member.

ParishSOFT® Family Suite

HELP - CONTACT - HOME - SIGN OUT

Good Shepherd Parish, Toledo
User1 (Kimberly Spindler)

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

Suspense Lookups System Setup Organizations Manage Staff Module Settings Utilities Notifications

Staff List

Sacred Heart, Grosse Pointe

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

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organiza
Dale, Marcia	Ms.		Marcia	117	10/10/1953	Sacred Heart	41
Lamb, John	Mr.		John	117	2/20/1971	Sacred Heart	41
Spindler, Kim	Mrs.		Kim	117	11/4/1959	Sacred Heart	41

Page 1 of 1 (3 Records)

- Click the drop down arrow to the right of the **All** designation and select your parish name. Then 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.

Find Member

Organization: Sacred Heart, Grosse Pointe

Last Name: Johnson

First Name:

City:

Search

Add New Member Cancel

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

Member Search

Last Name: Johnson

First Name:

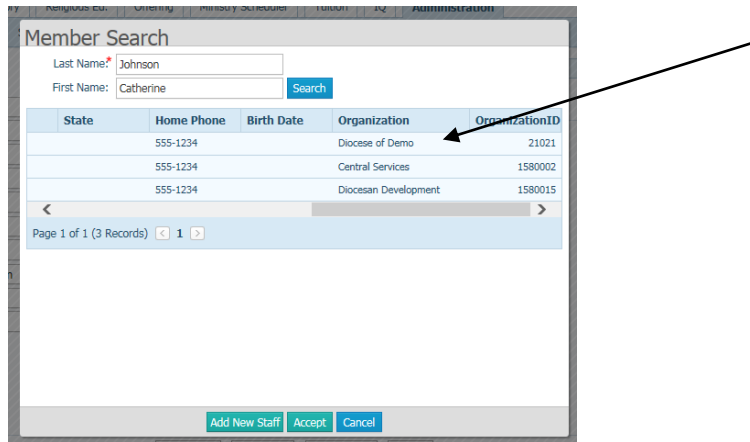
Search

Member Name	First Name	Last Name	EmailAddress	Address	City
Johnson, Cheryl	Cheryl	Johnson		2524 Windsong Ct	Ann
Johnson, Christopher	Christopher	Johnson		2809 Gundel Blvd	Ann
Johnson, Daniel	Daniel	Johnson		2631 Westbrook Dr	Ann
Johnson, David	David	Johnson		3232 Orchard Trail	Ann
Johnson, David	David	Johnson			Ann
Johnson, Deborah	Deborah	Johnson		4514 Talmadge Gre	Ann
Johnson, Denise	Denise	Johnson		319 E Broadway St	Ann
Johnson, Dorothy	Dorothy	Johnson		4643 Boydson Dr	Ann
Johnson, Douglas	Douglas	Johnson		3005 Avatar Ct	Ann
Johnson, Elizabeth	Elizabeth	Johnson		3005 Avatar Ct	Ann

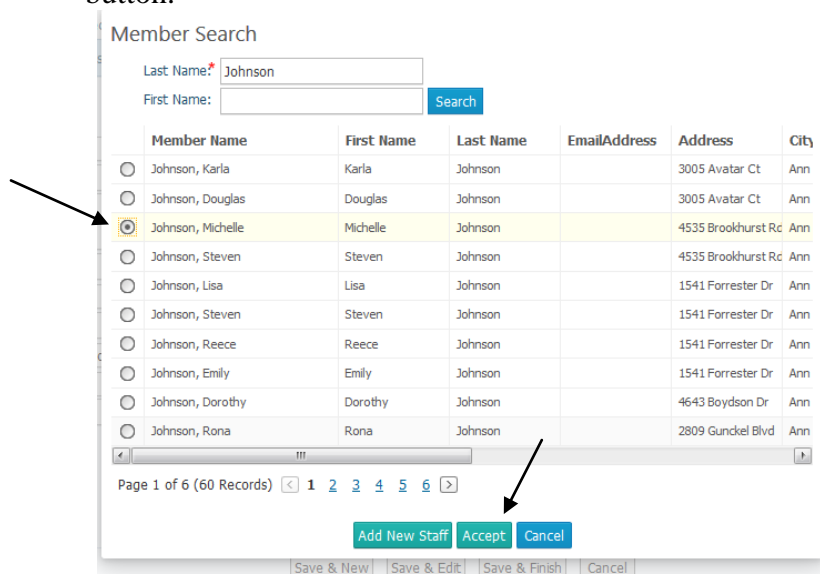
Page 1 of 6 (60 Records)

Add New Staff Accept Cancel

- If you have **NOT** specified your parish name, and you are trying to add someone outside your parish name, **AND** 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 that circumstance, you will most likely still be selecting the member listed at your parish name.

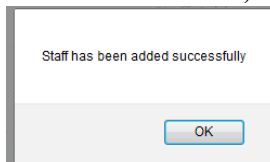


- Click the radial button on the far left side to select your member and then click the **Accept** button.



- 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, Michelle (783072)

Assignments Positions Access Rights Notes Sacred Heart, Grosse Pointe: 93

Additional Information

Username:

SS Num:

Email Address:

Email Username:

Email Password:

Outgoing Mail Server:

Reset Password

Add Assignment

Add Additional Assignment

Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release Date
<input checked="" type="checkbox"/>	Sacred Heart	Grosse Pointe	93	4/24/2018	

1 of 1 (1 Assignments) < 1 >

Edit Details Close

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

Johnson, Michelle (783072)

Assignments Positions Access Rights Notes Sacred Heart, Grosse Pointe: 93

Additional Information

Username:

SS Num:

Email Address:

Email Username:

Email Password:

Outgoing Mail Server:

Reset Password

Add Assignment

Add Additional Assignment

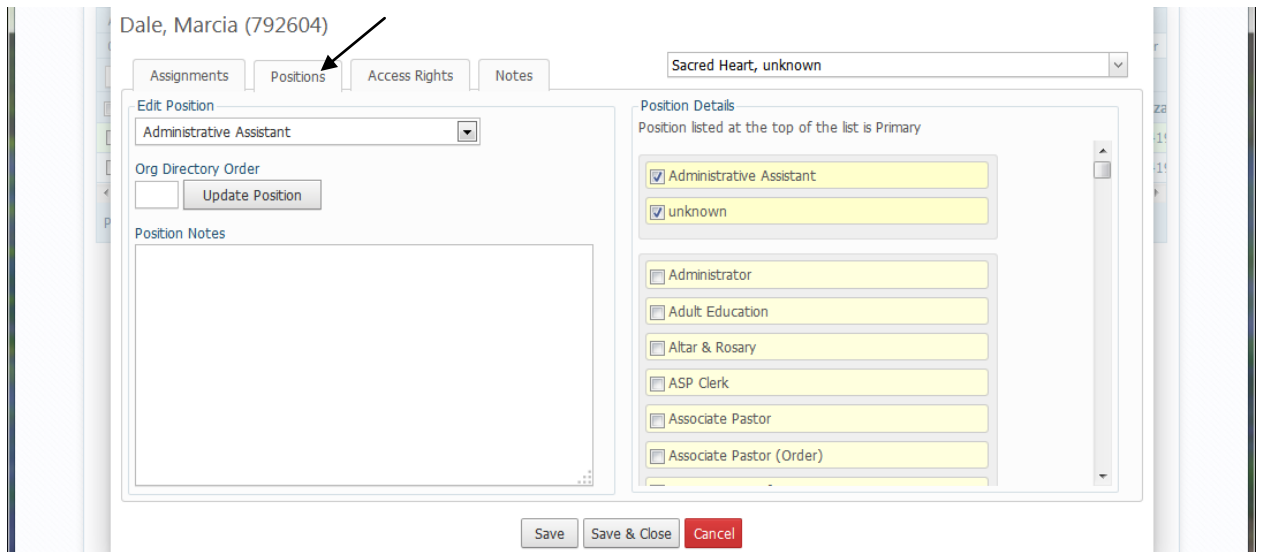
Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release Date
<input checked="" type="checkbox"/>	Sacred Heart	Grosse Pointe	93	4/24/2018	

1 of 1 (1 Assignments) < 1 >

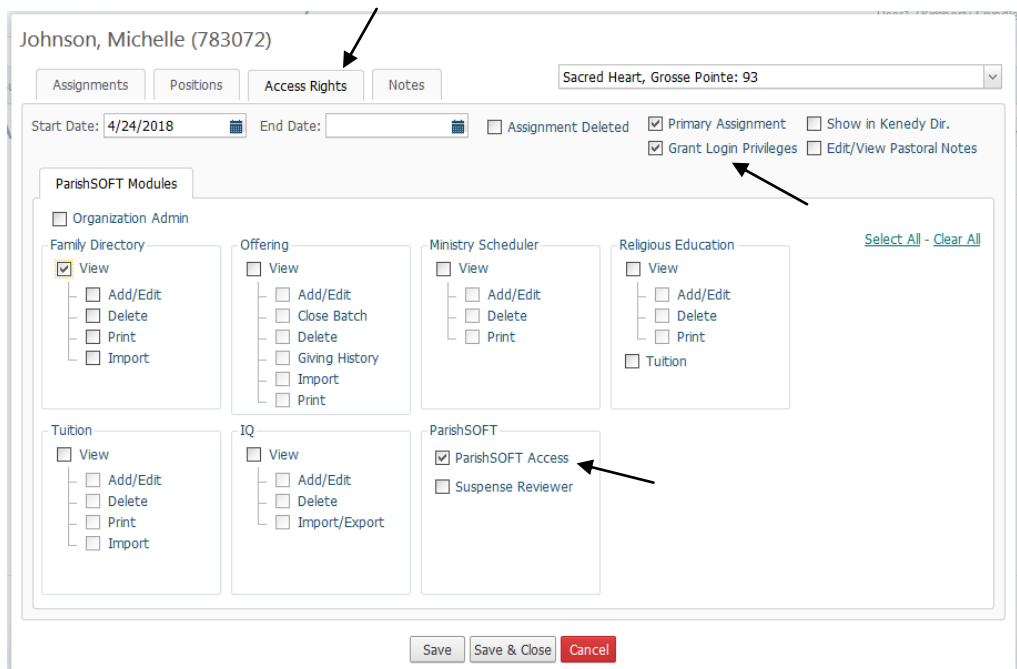
Save Save & Close Cancel

10. 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.
11. 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**.

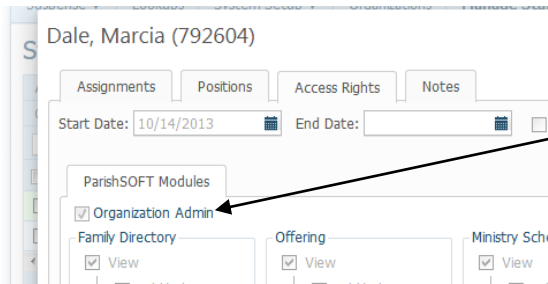


*Please note: You can't un-do the **Unknown** checkbox until you've assigned the staff member to another position.*

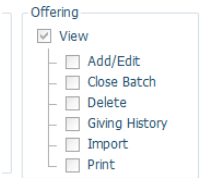
12. Finally, click on the **Access Rights** tab for this staff member. Click **Edit Details** and assign the appropriate permissions for this user. (at a minimum, you must have **Grant Login Privileges**, **ParishSOFT Access** and one other checkbox of a View under and area for the person to see ParishSOFT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



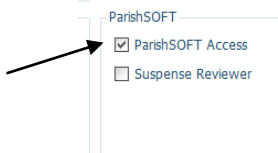
- a. The **Organization Admin** button should be assigned to one or two key users of the system. This setting allows those users to set up other staff members, see all funds in Offertory, etc. This is the highest access in the system.



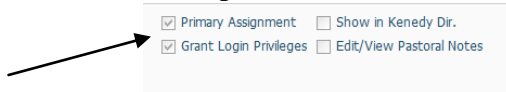
- b. For each section, check or uncheck the boxes as it applies to each member. In the example below, under the **Offering** area, this staff member is allowed to view “some” Offering funds, which we will set up right after finalizing their overall staff setup.



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



- d. **Grant Login Privileges** and **Primary Assignment** also needs to be selected for the staff member to have a login into ParishSOFT online. (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**

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

	Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organiza
<input type="checkbox"/>	Dale, Marcia	Ms.		Marcia	117	10/10/1953	Sacred Heart	41
<input type="checkbox"/>	Johnson, Michelle	Mrs.		Michelle	93	3/13/1972	Sacred Heart	41
<input type="checkbox"/>	Lamb, John	Mr.		John	117	2/20/1971	Sacred Heart	41
<input type="checkbox"/>	Spindler, Kim	Mrs.		Kim	117	11/4/1959	Sacred Heart	41

Adding Offertory Permissions

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

- a. 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:

ParishSOFT[®] Family Suite

HELP - CONTACT - HOME - SIGN OUT

Good Shepherd Parish, Toledo
User1 (Kimberly Spindler)

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

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

Fund Management Good Shepherd Parish, Toledo

10 records | + Add Fund | Fund Permissions

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan Fund #
20025	All Things	19631	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
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"/>	
9001-2017	CFSA 2017	19580	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
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"/>	

Page 1 of 6 (55 Records) | 1 2 3 4 5 6

- b. Click on the **Fund Permissions** seen above and you will see a screen similar to the one below. Click the **Manage by Member** link, as seen above

Manage Fund Permissions

Manage by Fund | **Manage by Member**

Funds

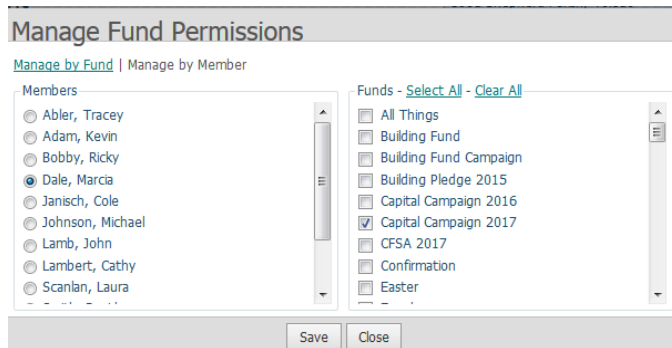
- All Things
- Building Fund
- Building Fund Campaign
- Building Pledge 2015
- Capital Campaign 2016
- Capital Campaign 2017
- CFSA 2017
- Confirmation
- Easter

Members - [Select All](#) - [Clear All](#)

- Abler, Tracey
- Adam, Kevin
- Bobby, Ricky
- Dale, Marcia
- Janisch, Cole
- Johnson, Michael
- Lamb, John
- Lambert, Cathy
- Scanlan, Laura

Save Close

- c. 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.

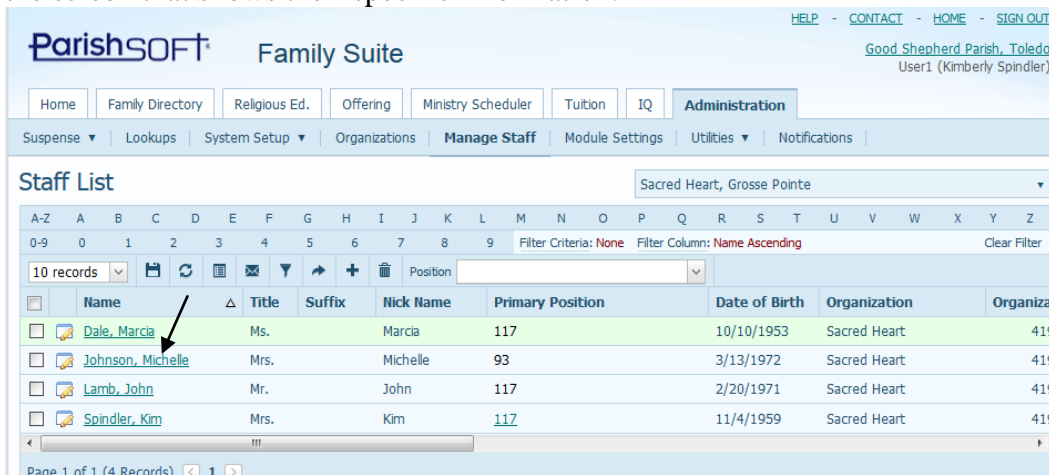


- d. In the example above, Marcia is our fundraiser for just the Capital Campaign going on at the parish. Instead of her asking key staff members for updated information, we've given her permission to view just that fund, when she's looking in the system.
- e. When finished editing all staff members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

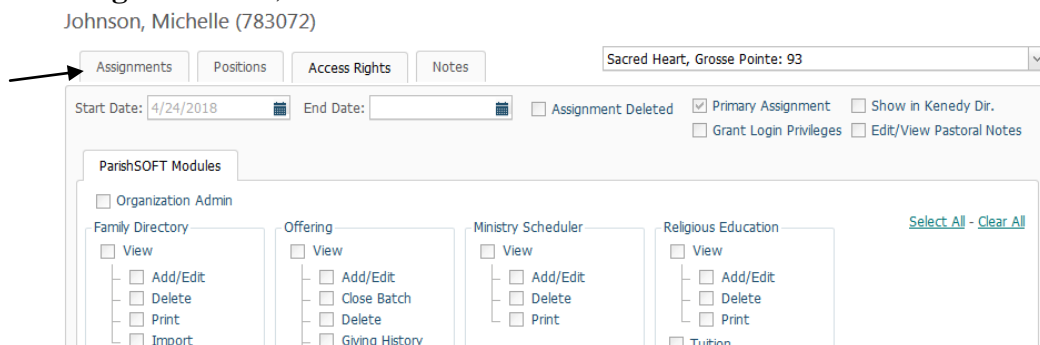
Resetting a password through the Administration tab

If you have a staff member that has either forgot their username or their password, please follow the steps below to reset their password and send them a new email with this information.

14. On the **Administration < Manage Staff** area, click on the staff member's name to open the screen that shows their specific information.



15. The screen will open with the **Access Rights** tab open, as seen below. Click on the **Assignments** tab, indicated below:



16. The screen will refresh with the following information.

Johnson, Michelle (783072)

Assignments Positions Access Rights Notes Sacred Heart, Grosse Pointe: 93

Additional Information

Username:

SS Num:

Email Address:

Email Username:

Email Password:

Outgoing Mail Server:

Add Assignment

Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release Date
<input checked="" type="checkbox"/>	Sacred Heart	Grosse Pointe	93	4/24/2018	

1 of 1 (1 Assignments) < 1 >

17. Click the **Edit Details** button at the bottom, then click the **Reset Password** button. You will get a message confirming you wish to reset the password, click OK.

18. You will also see a message confirming the password was sent, as seen below. Click **Ok** then click **Save & Close** and inform the staff person that the login link, with username and new temporary password should be in their email inbox.

Reset Password Confirmation

User new temporary password has been sent!

An email with the user's new temporary password has been sent to support@parishsoft.com. It should arrive shortly.