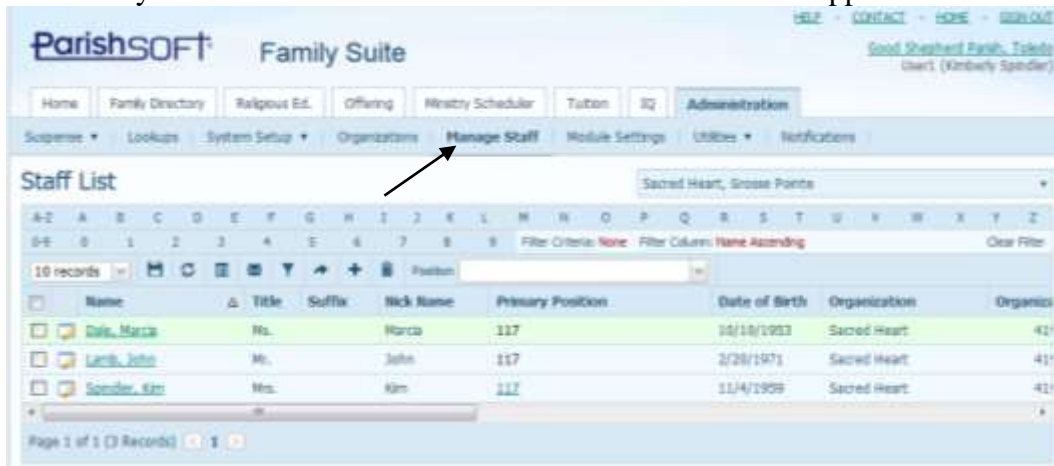


Setting up Staff in ParishSOFT

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.

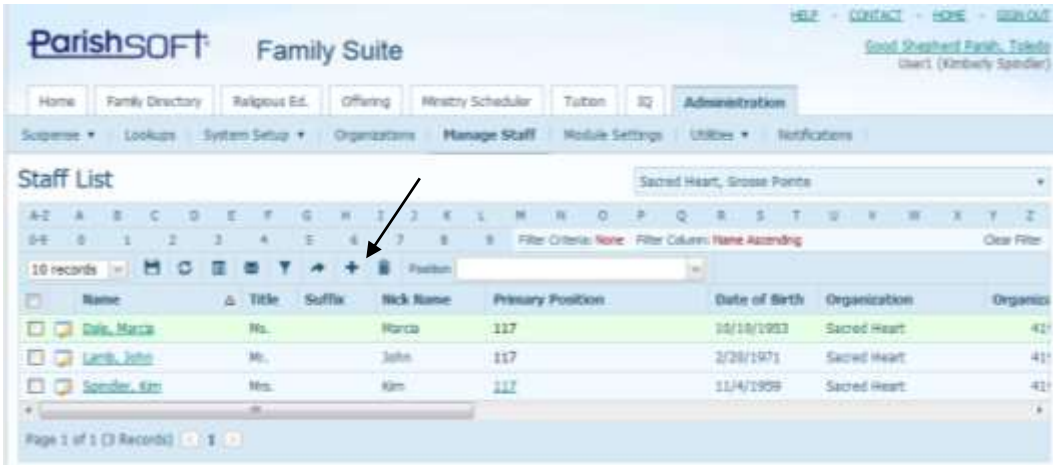


2. Click on the **Administration** tab, then on the **Manage Staff** area in the blue options directly below the **Administration** tab. The screen should appear similar to below:

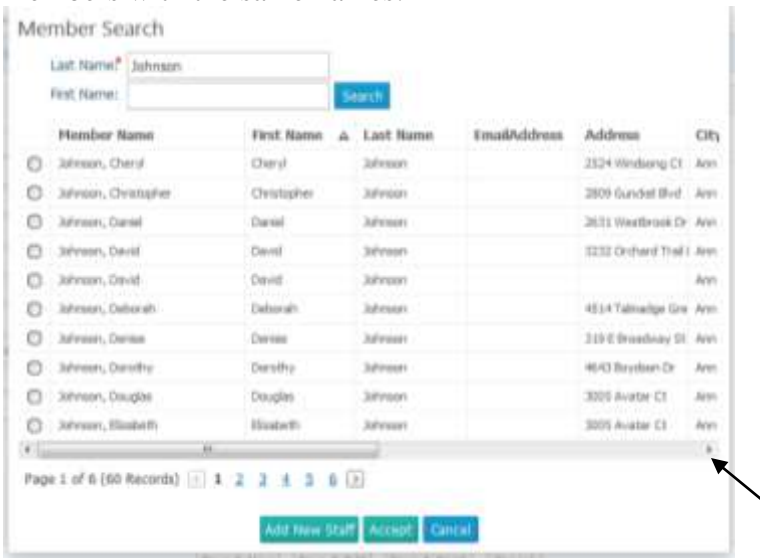


If you already have a staff member listed in this screen and just wish to send them a login with a temporary password, please go to step 14 on the last 2 pages of this document to “reset” their password and have their username and temporary password sent by email.

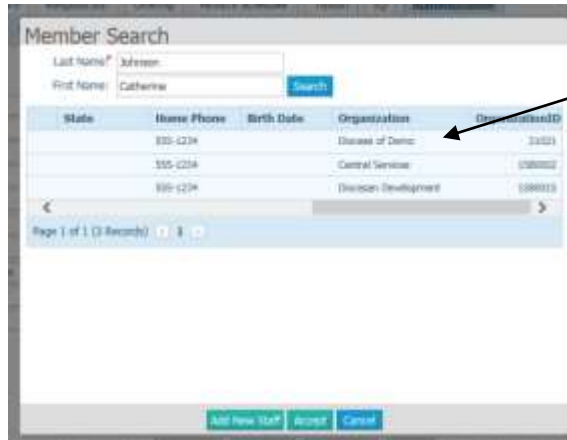
3. Click on the plus sign in the blue icon area and you will be taken to a basic search screen to find the member prior to adding them in as a staff member.



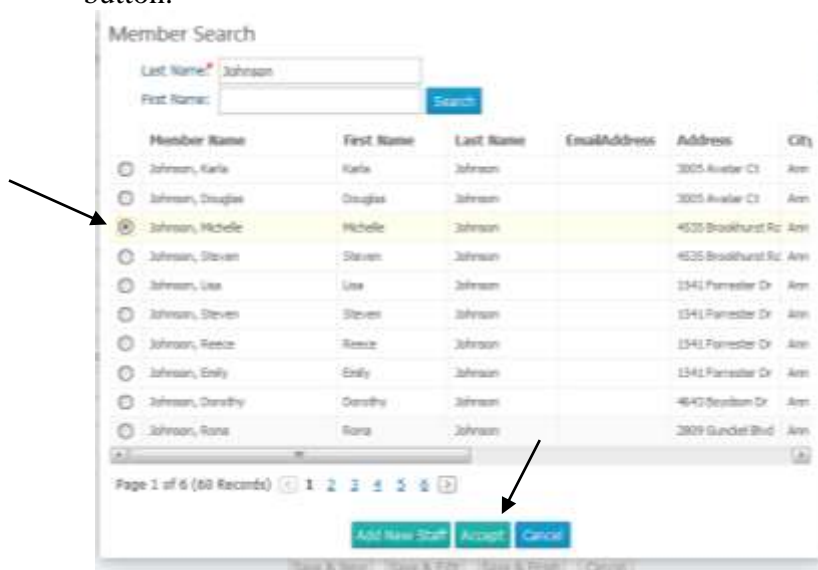
4. Enter in the last name for the staff member you wish to add and possibly their first name too, if they have a common last name. Click **Search** and you will be able to see different members with the same names:



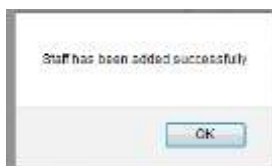
- a. If you have NOT specified your parish name, and you are trying to add someone outside your parish name, AND there is more than one listing for your person, please scroll over to the right (see arrow above) to view the address and organizations which the member is affiliated with. In that circumstance, 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, Gross Points: 93

Additional Information

Username:

SS Num:

Email Address:

Email Username:

Email Password:

Outgoing Mail Server:

Reset Password

Add Assignment

Add Additional Assignment

Assignments Details

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

1 of 1 (1 Assignments)

See Details Close

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

Johnson, Michelle (783072)

Assignments Positions Access Rights Notes Sacred Heart, Gross Points: 93

Additional Information

Username: Johnson_Michelle

SS Num:

Email Address: support@parashoft.com

Email Username:

Email Password:

Outgoing Mail Server:

Reset Password

Add Assignment

Add Additional Assignment

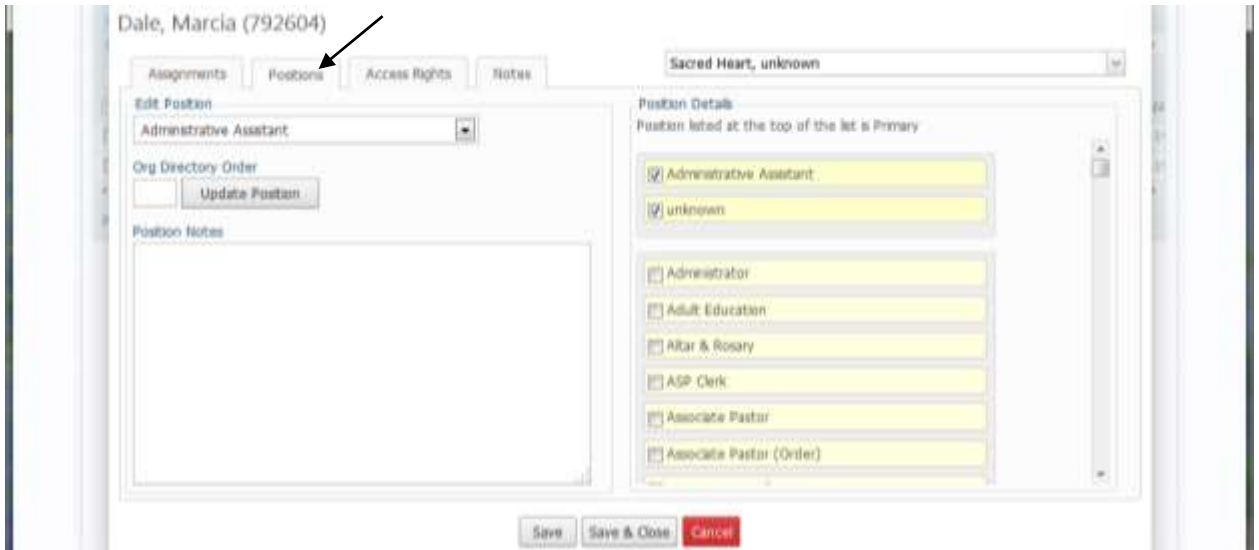
Assignments Details

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

1 of 1 (1 Assignments)

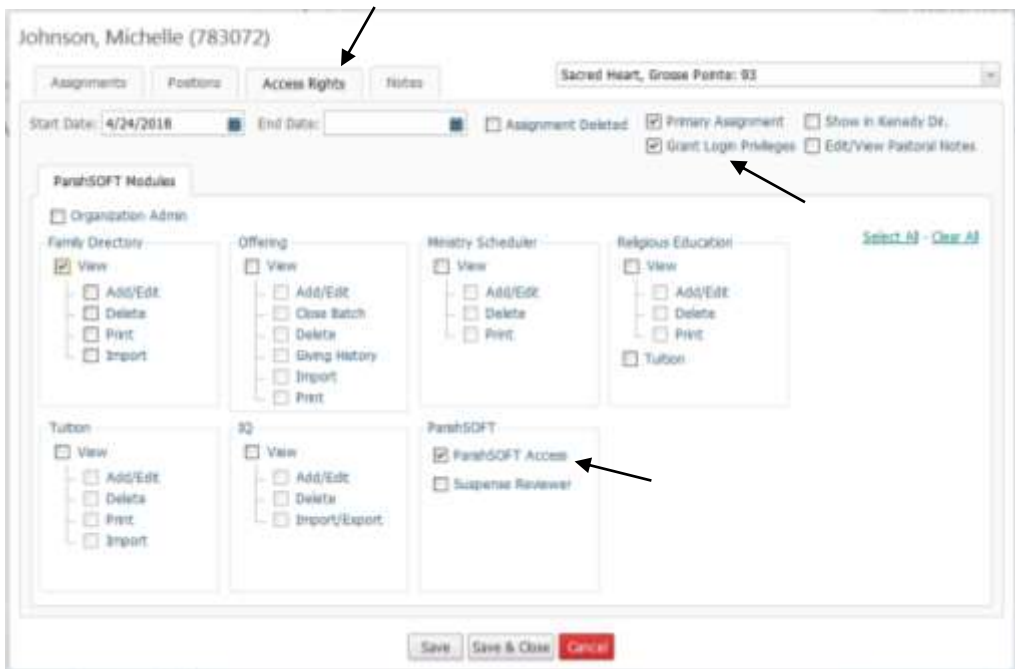
Save Save & Close Cancel

- 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.
- 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 check-marking 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.

11. 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**

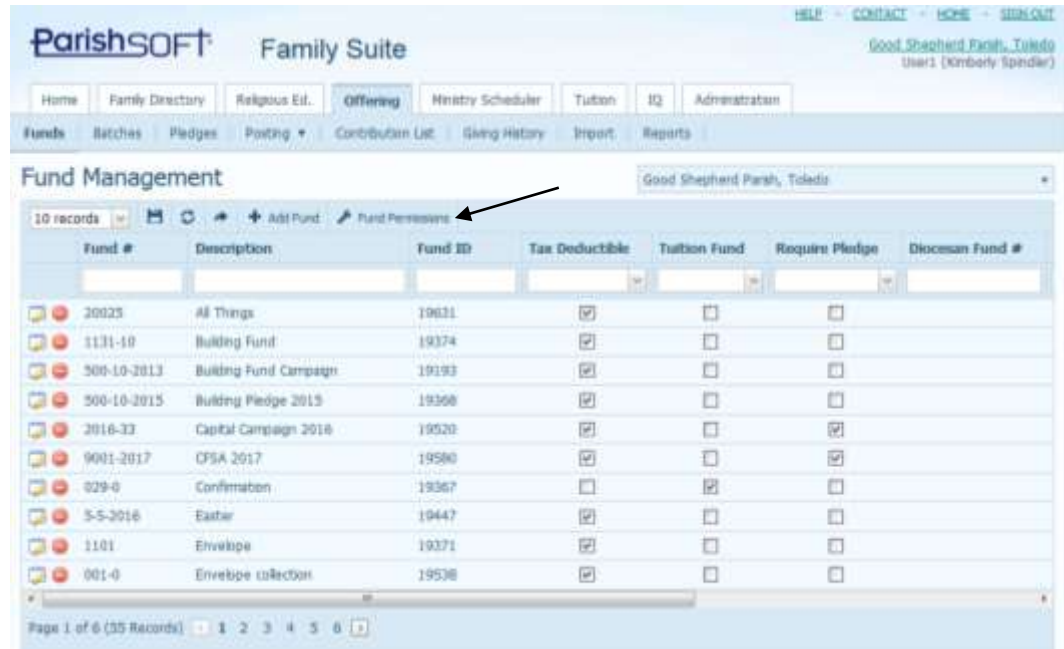
12. You will now be back on the main **Manage Staff** screen and should be able to see the member listed there.

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organiz...
John, Marcia	Mr.		Marcia	117	10/10/1953	Sacred Heart	411
Johansen, Michelle	Mrs.		Michelle	93	3/13/1972	Sacred Heart	411
Lamb, John	Mr.		John	117	2/20/1971	Sacred Heart	411
Spencer, Kim	Mrs.		Kim	117	11/4/1959	Sacred Heart	411

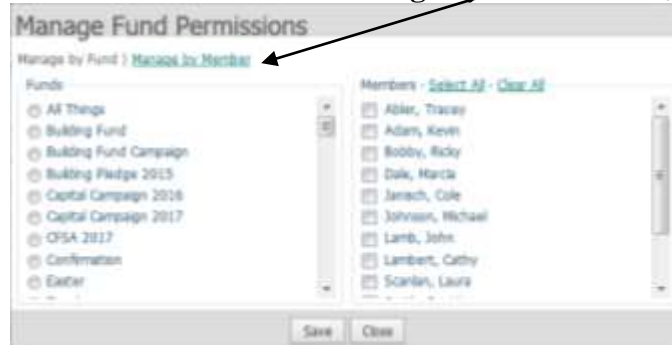
Adding Offertory Permissions

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

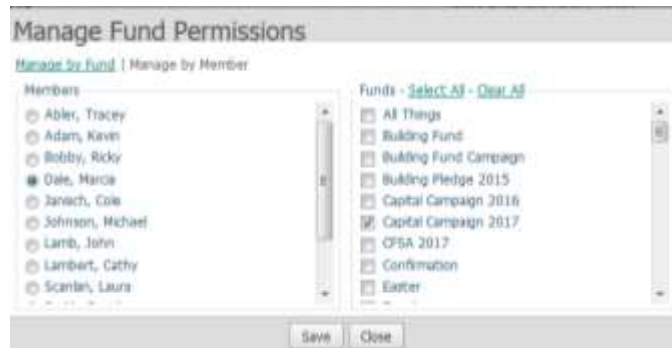
- a. Click on the **Offering** tab, then go to the section directly underneath the tab in blue called: **Funds** You will see a screen similar to the one below:



- 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



- 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.

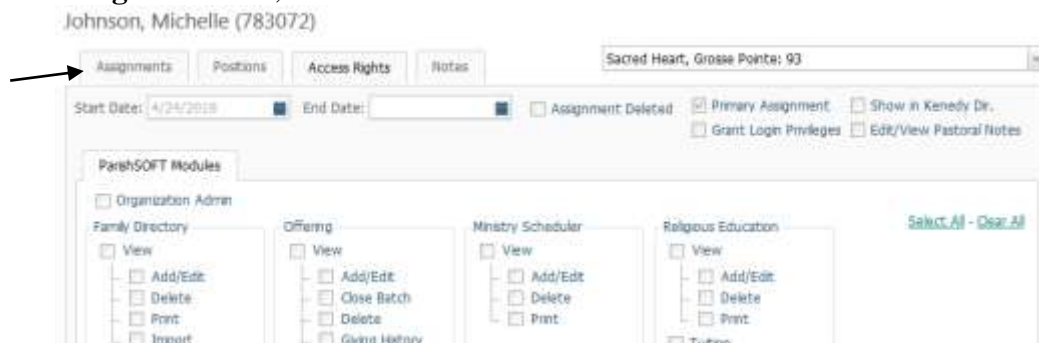
Resetting a password through the Administration tab

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.

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



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



15. The screen will refresh with the following information.

Johnson, Michelle (783072)

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

Additional Information

Username: Johnson_Michelle
SS Num:
Email Address: support@parashoft.com
Email Username:
Email Password:
Outgoing Mail Server:
Reset Password

Add Assignment
Add Additional Assignment

Assignments Details

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

1 of 1 (1 Assignments)

Edit Details Done

16. 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.

17. 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@parashoft.com. It should arrive shortly.

OK