How to Effectively Manage Staff and Permissions in ParishSOFT Family Suite

Elaine Tank
ParishSOFT
Today’s Agenda

• Importance of Permissions
• What is Appropriate Access?
  – Permission Guidelines
• Best Practices
• Types of Access
• Granting Access
• Ending Access
Importance of Permissions

Why do we need permissions?

• Access to the Program
• Access Control
• Data Security
What is Appropriate Access?

• Grant only the privileges that are required for the job function, not every member needs a login.

• Limit who has the ability to delete.
  – Are delete permissions needed to perform their job?

• Only one or two Organization Admin
  – Only a select few need full rights to the application.
What is Appropriate Access?

Permission Guidelines

• **Pastor, Parish Administrator and/or Business Managers:** Organization Admin

• **Secretary:** Add/Edit/Print for Family Directory
  — View/Print for other Modules; Delete rights??

• **Bookkeeper:** Add/Edit/Print for Offerings and Family Directory.

• **Religious Ed Coordinator:** Add/Edit/Print for Religious Education & Tuition

• **Liturgy Coordinator (Or Ministry Scheduler):** Add/Edit/Print for Ministry Scheduler and View/Print for Family Directory.
Best Practices

• Email Accounts that use your organization’s domain name
• Individual Accounts with Unique Logins
  – NO shared accounts
• Periodic Authorization Reviews
Best Practices

• Set up email accounts that use your organization’s domain name.

• Named user email accounts

Best Practices

Use Individual Accounts with Unique Logins

NOT shared accounts
Best Practices

• Schedule periodic authorization reviews of all user accounts.
  – Change in Job Responsibilities
  – Individuals Leave
Types of Access

- Organization Admin
- ParishSOFT Access
- Suspense Reviewer
- ParishSOFT Modules
Types of Access: Organization Admin
Types of Access: ParishSOFT Access
# Types of Access: Suspense Reviewer

<table>
<thead>
<tr>
<th>ParishSOFT Modules</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Family Directory</strong></td>
</tr>
<tr>
<td>- View</td>
</tr>
<tr>
<td>- Add/Edit</td>
</tr>
<tr>
<td>- Delete</td>
</tr>
<tr>
<td>- Print</td>
</tr>
<tr>
<td>- Import</td>
</tr>
<tr>
<td><strong>Offering</strong></td>
</tr>
<tr>
<td>- View</td>
</tr>
<tr>
<td>- Add/Edit</td>
</tr>
<tr>
<td>- Close Batch</td>
</tr>
<tr>
<td>- Print</td>
</tr>
<tr>
<td><strong>Ministry Scheduler</strong></td>
</tr>
<tr>
<td>- View</td>
</tr>
<tr>
<td>- Add/Edit</td>
</tr>
<tr>
<td>- Delete</td>
</tr>
<tr>
<td>- Print</td>
</tr>
<tr>
<td><strong>Religious Education</strong></td>
</tr>
<tr>
<td>- View</td>
</tr>
<tr>
<td>- Add/Edit</td>
</tr>
<tr>
<td>- Delete</td>
</tr>
<tr>
<td>- Print</td>
</tr>
<tr>
<td><strong>Tuition</strong></td>
</tr>
<tr>
<td>- View</td>
</tr>
<tr>
<td>- Add/Edit</td>
</tr>
<tr>
<td>- Delete</td>
</tr>
<tr>
<td>- Print</td>
</tr>
<tr>
<td><strong>IQ</strong></td>
</tr>
<tr>
<td>- View</td>
</tr>
<tr>
<td>- Add/Edit</td>
</tr>
<tr>
<td>- Delete</td>
</tr>
<tr>
<td>- Print</td>
</tr>
<tr>
<td><strong>ParishSOFT</strong></td>
</tr>
<tr>
<td>- ParishSOFT Access</td>
</tr>
<tr>
<td>- Suspense Reviewer</td>
</tr>
</tbody>
</table>

Start Date: 5/1/2017  End Date: 

- Primary Assignment
- Grant Login Privileges
- Edit/View Pastoral Notes
- Assignment Deleted
- Show in Kenedy Dir.

Select All - Clear All
Types of Access:  ParishSOFT Module Access

ParishSOFT Modules

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

Select All - Clear All

ParishSOFT
Celebrating 20 Years of Service
Types of Access

- Organization Admin
- ParishSOFT Access
- Suspense Reviewer
- ParishSOFT Modules
Granting Access

What You Need to Grant Access and Add a New Staff Member to your organization.

1. Organization Admin Permissions
   – Grant Login Privileges

2. An Email Address for the user you are adding.

3. A Family Record for the new user within the organization you are creating the staff record for.
Granting Access

1. Administration

2. Manage Staff

### ParishSOFT Family Suite

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Suffix</th>
<th>Nick Name</th>
<th>Primary Position</th>
<th>Date of Birth</th>
<th>Organization</th>
<th>Organizational Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin, Dio</td>
<td>Ms</td>
<td></td>
<td></td>
<td>Administrator</td>
<td>7/29/1960</td>
<td>St William Parish</td>
<td>50003</td>
</tr>
<tr>
<td>Scott, Lisa</td>
<td>Ms</td>
<td></td>
<td></td>
<td>Administrative Assistant</td>
<td>5/9/1971</td>
<td>St William Parish</td>
<td>50003</td>
</tr>
<tr>
<td>Spindler, Kimberly</td>
<td>Mrs.</td>
<td></td>
<td></td>
<td>Administrator</td>
<td>2/20/1973</td>
<td>St William Parish</td>
<td>50003</td>
</tr>
<tr>
<td>Trainer, Joe</td>
<td>Mr.</td>
<td></td>
<td></td>
<td>Bookkeeper</td>
<td>9/13/1981</td>
<td>St William Parish</td>
<td>50003</td>
</tr>
</tbody>
</table>
Granting Access

1. Administration
2. Manage Staff
3. St. William Parish, Ann Arbor
4. Staff List

- Admin_Dio
- Scott, Lisa
- Spindler, Kimberly
- Trainer, Joe

- Title: Ms, Ms, Mrs., Mr.
- Nick Name: unknown, Administrative Assistant, Administrator, Bookkeeper
- Position:
- Organization: St William Parish

Page 1 of 1 (4 Records)
Granting Access

Add Staff

Find Member

1. Last Name: Abler
2. Search

Staff Address

Organization: All

Prefix: [Dropdown]
First Name: [Field]
Last Name: [Field]
Nick Name: [Field]
Middle Name: [Field]
Suffix: [Field]
Email Address: [Field]
Gender: [Dropdown]
Birth Date: [Field]
Maiden Name: [Field]

Address Type: Home

Add New Member | Cancel
Granting Access

Member Search

<table>
<thead>
<tr>
<th>Member Name</th>
<th>First Name</th>
<th>Last Name</th>
<th>EmailAddress</th>
<th>Address</th>
<th>City</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abler, Jason</td>
<td>Jason</td>
<td>Abler</td>
<td>abler@demoemail 2351 Ellsworth Rd</td>
<td>Ypsilanti</td>
<td></td>
</tr>
<tr>
<td>Abler, Tracey</td>
<td>Tracey</td>
<td>Abler</td>
<td>cmann@parishsoft 2351 Ellsworth Rd</td>
<td>Ypsilanti</td>
<td></td>
</tr>
<tr>
<td>Abler, Griffin</td>
<td>Griffin</td>
<td>Abler</td>
<td>2351 Ellsworth Rd</td>
<td>Ypsilanti</td>
<td></td>
</tr>
<tr>
<td>Abler, Parker</td>
<td>Parker</td>
<td>Abler</td>
<td>2351 Ellsworth Rd</td>
<td>Ypsilanti</td>
<td></td>
</tr>
<tr>
<td>Abler, Spencer</td>
<td>Spencer</td>
<td>Abler</td>
<td>2351 Ellsworth Rd</td>
<td>Ypsilanti</td>
<td></td>
</tr>
<tr>
<td>Abler, Tracey</td>
<td>Tracey</td>
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<td>cmann@parishsoft 2351 Ellsworth Rd</td>
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<td></td>
</tr>
</tbody>
</table>

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

Add New Staff  Accept  Cancel
Granting Access

trainingdemo4.parishsoftfamilysuite.com says
Staff has been added successfully

Please Wait While Your Content Loads...
Granting Access: Assignments

Abler, Jason (1000020)

1. Additional Information
   - Username: Abler.Jason
   - SS Num: 
   - Email Address: abler@demoemailaddress

2. Assignments Details
   - Pri. Assignment: ✓
   - Organization: St William Parish
   - City: Ann Arbor
   - Primary Position: unknown
   - Hire Date: 5/25/2018

3. Add Assignment
   - Add Additional Assignment

Buttons: Save, Save & Close, Cancel
Granting Access: Positions

Abler, Jason (1000020)

[Diagram showing access and position details]

1. Positions

2. Edit Details

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

- unknown

- Administrative Assistant
- Administrator
- Adult Faith Formation
- Adult Faith Formation Coordinator
- Altar & Rosary
- ASP Clerk
- Associate Pastor
- Associate Pastor (Order)
Granting Access: Positions

Abler, Jason (1000020)

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

- unknown
- Administrative Assistant
- Administrator
- Adult Faith Formation
- Adult Faith Formation Coordinator
- Altar & Rosary
- ASP Clerk
- Associate Pastor
- Associate Pastor (Order)
Granting Access: Positions

Click on "Adult Faith Formation" and drag it to the top.
Granting Access: Positions

Abler, Jason (1000020)

Edit Position
Adult Faith Formation

Org Directory Order
Update Position

Position Notes

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

- [x] Adult Faith Formation
- [x] unknown

Un-check the box next to unknown

Save  Save & Close  Cancel
Granting Access: Positions

Abler, Jason (1000020)

Edit Position
Adult Faith Formation

Org Directory Order
Update Position

Position Notes

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

- Adult Faith Formation
- unknown
- Administrative Assistant
- Administrator
- Adult Faith Formation Coordinator
- Altar & Rosary
- ASP Clerk
- Associate Pastor
- Associate Pastor (Order)

Save  Save & Close  Cancel
Granting Access: Access Rights
Granting Access: Access Rights

Abler, Jason (1000020)

Start Date: 5/25/2018
End Date: 

- Assignment Delete
- Primary Assignment
- Show in Kenedy Dir.
- Grant Login Privileges
- Edit/View Pastoral Notes

ParishSOFT Modules

- Organization Admin
- Family Directory
  - View
  - Add/Edit
  - Delete
  - Print
  - Import
- Offering
  - View
  - Add/Edit
  - Close Batch
  - Delete
  - Print
  - Giving History
  - Import
  - Print
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  - Delete
  - Print
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  - View
  - Add/Edit
  - Delete
  - Print
  - Tuition

Tuition
- View
- Add/Edit
- Delete
- Print
- Import

IQ
- View
- Add/Edit
- Delete
- Import/Export

ParishSOFT
- ParishSOFT Access
- Suspense Reviewer

Save | Save & Close | Cancel
Granting Access

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<tr>
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<th>Nick Name</th>
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<th>Organization</th>
<th>Organization Code</th>
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</thead>
<tbody>
<tr>
<td>Abler, Jason</td>
<td>Mr.</td>
<td></td>
<td></td>
<td>Adult Faith Formation</td>
<td>3/16/1981</td>
<td>St William Parish</td>
<td>50003</td>
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# Ending Access

## Staff List

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</tr>
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<td>Trainer, Joe</td>
<td>Mr.</td>
<td></td>
<td></td>
<td>Bookkeeper</td>
<td>9/13/1981</td>
<td>St William Parish</td>
</tr>
</tbody>
</table>
Ending Access

Start Date: 4/7/2017

To specify a specific date click the calendar icon.

To end date as of today, select the Assignment Deleted checkbox.

1. Assignment Deleted

2. Save & Close
## Reset Password

- **Staff List**

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Nick Name</th>
<th>Position</th>
<th>Date of Birth</th>
<th>Organization</th>
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</thead>
<tbody>
<tr>
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<td>Ms</td>
<td></td>
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<td>Bookkeeper</td>
<td>9/13/1981</td>
<td>St William Parish</td>
</tr>
</tbody>
</table>
Reset Password

Scott, Lisa (1010879)

Assignments

Username: lscott
SS Num:
Email Address: lscott@demoemailaddress
Email Username:
Email Password:
Outgoing Mail Server:

Add Assignment

Add Additional Assignment

Assignments Details

<table>
<thead>
<tr>
<th>Pri. Assignment</th>
<th>Organization</th>
<th>City</th>
<th>Primary Position</th>
<th>Hire Date</th>
<th>Release Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>St William Parish</td>
<td>Ann Arbor</td>
<td>Administrative Assistant</td>
<td>10/20/2017</td>
<td></td>
</tr>
</tbody>
</table>

1 of 1 (1 Assignments)
Reset Password

User new temporary password has been sent!

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

1. Reset Password
2. OK
3. OK
Reset Password

Welcome - Log In Below

Username:* ETank
Password:* 

Log In

For security purposes - we only support the following browsers
IE 9.0+, Edge, Chrome, Firefox and Safari.
If you do not have any of these installed on your system you must install or upgrade to one of them before you can login.

New User? Lost password?

Use of this software, website, and services is subject to the Terms of Use

Application Version #: 4.4.3.8, Database Version #: 4.4.3.8 updated on: 3/13/2018

Release Notes
Reset Password

Please enter all required information below to receive an E-Mail with your username and new temporary password.

1. User Name: ETank
   First Name: Elaine
   Last Name: Tank
   E-Mail: Tank#@demoemailadresse
   Postal Code: 48108

2. Phone Number:

   Send Password  Cancel
Reset Password

Connecting People and the Church

Your new temporary password has been sent!

An email with your new temporary password has been sent to TankE@demoemailaddress.com. It should arrive shortly.
Once you have your password you can Click Here to login to your account.
If you have not received an email please Contact Us for further assistance.
QUESTIONS?
Thank you!

Elaine Tank
ParishSOFT