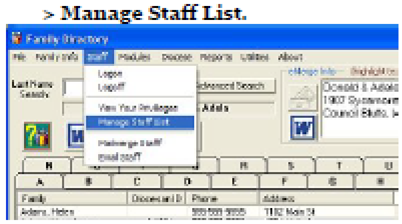
How to add a Staff member for a syncing Parish

Manage Staff List in AIM Synchronizing Parishes

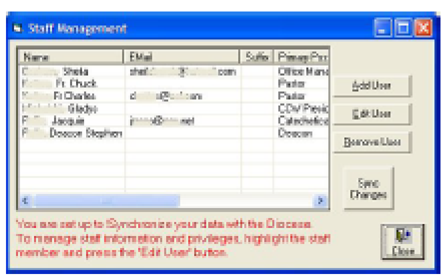
If your ParishSOFT database is synchronizing with your diocesan AIM database, use this procedure to add staff, grant login rights, and grant access rights to designated areas in your ParishSOFT database.

You must be an **Organization Administrator** in your parish database to add or edit staff.

1. From your ParishSOFT Family Directory Module, click **Staff menu > Manage Staff List.**



2. The *Staff Management* screen will open and display the staff members currently set up in your ParishSOFT database.



   a. Click the **Add User** button. The *Persons* screen will open.

   b. Type the last name of the person and click the **Search** button. If the search finds the person in the database, select his name and click the **Accept** button. If

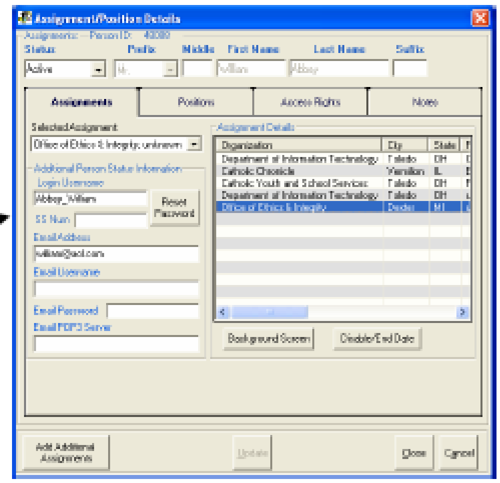
The person does not appear. Create a new family and member before adding them as staff**(DO NOT USE THE CREATE NEW BUTTON)**

c. On the *Add New Person* screen, choose a **Prefix** or select the "blank" option from the lookup table. Tab through each field entering data as you go. Click **Create** to save.

3. The *Assignment/Position Details* screen will open (your diocese can view this same screen from its ParishSOFT database).

4. Enter a **Login Username**, Social Security (**SS Num**), **Email Username**, **Email Password**, and **Email POP3 Server** (or **Email Outbound**).

5. Click the **Update** button.



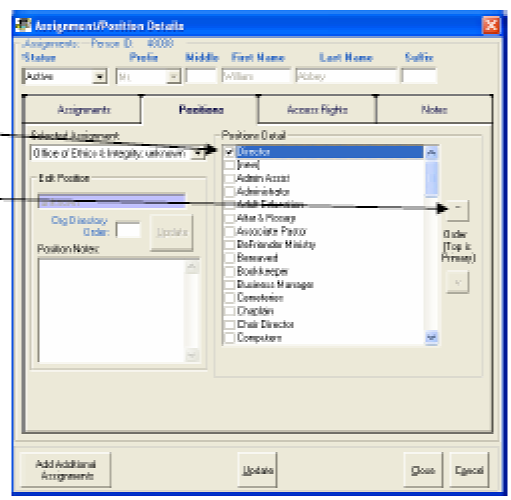
6. Click the **Positions** tab and check the position(s) that the member will hold in the organization.

a. Click to place a checkmark in the primary position.

b. Click the ^ button to promote it to the top of the list.

c. Uncheck the *unknown* position.

d. Click **Yes** to remove the Unknown position from the person's assignment record.



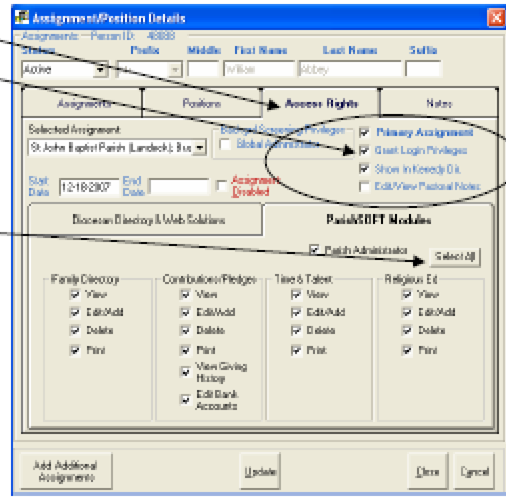
7. Click the **Access Rights** tab.

8. Check the **Grant Login Privileges** box. See *Database Management and Security*, page 7, for guidance on assigning access rights to users.

9. Click the **ParishSOFT Modules** tab. Use the **Select All** button or check individual boxes to give the user privileges as needed to *Family Directory*, *Contributions/ Pledges*, *Time & Talent*, and *Religious Ed*. Uncheck a box to remove a privilege.

10. Click **Close** to save and exit.

11. On the *Staff Management* screen, click the **Sync Changes** button to update your local database with the diocesan database.

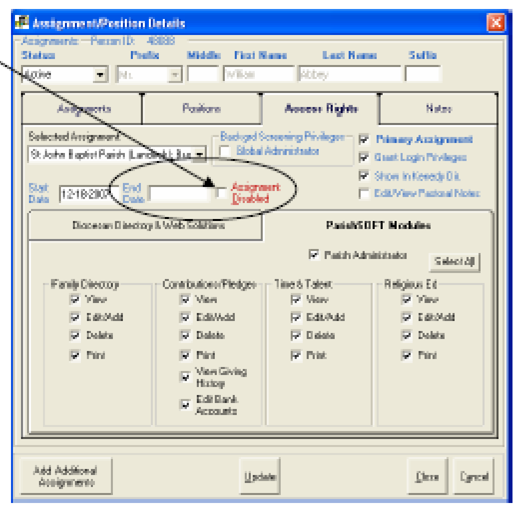


Disable User Privileges

Check the **Assignment Disabled** box to revoke a user's login privileges. The assignment **End Date** will populate with today's date. Click **Update** to save your changes.

A user with a disabled assignment cannot log in to any ParishSOFT applications, including the Safe Environment Program Manager (if applicable to your parish) from a web browser.

Disable privileges for any employee or volunteer who leaves your organization.



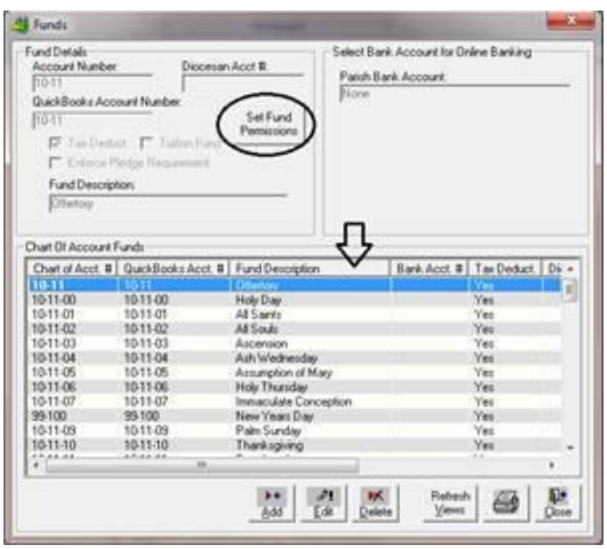
<u>HOW TO SET FUND PERMISSIONS</u>

1. Log in to the Offerings module as an administrator

2. Click on the add/edit/delete Funds button

3. Highlight a fund

4. Click on the Set Fund Permissions button



5. Move any name from the left to the right side to grant fund permissions

6. Click on the update button

7. Repeat for each fund you wish to grant someone permission to view, edit, delete contributions from