

Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This new sletter w ill be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

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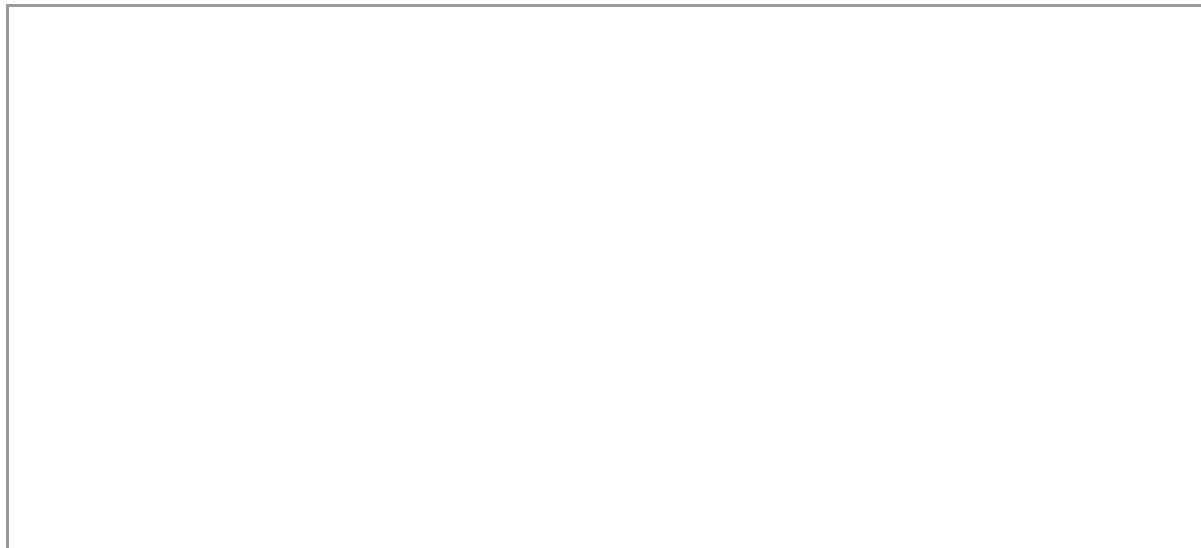


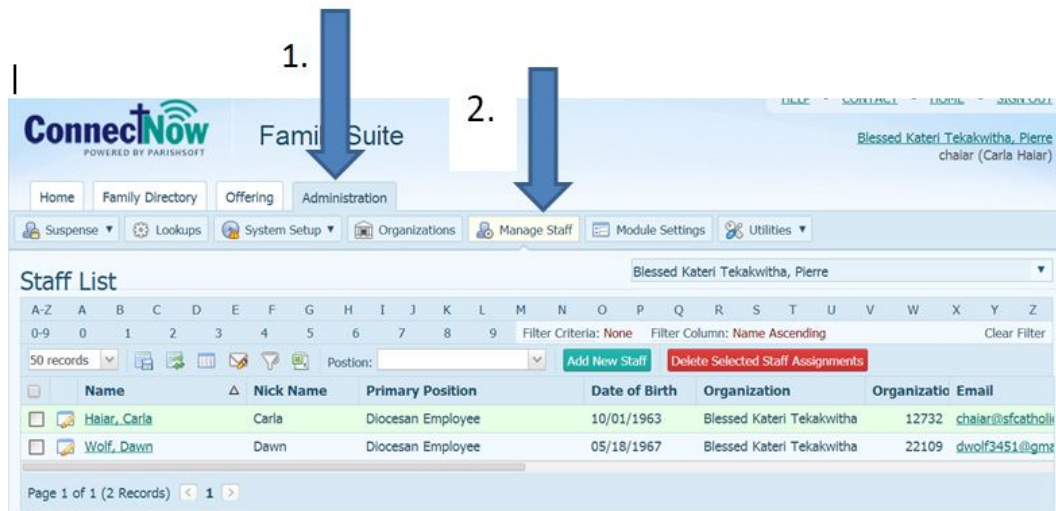
Catholic Diocese of Sioux Falls



Manage Staff

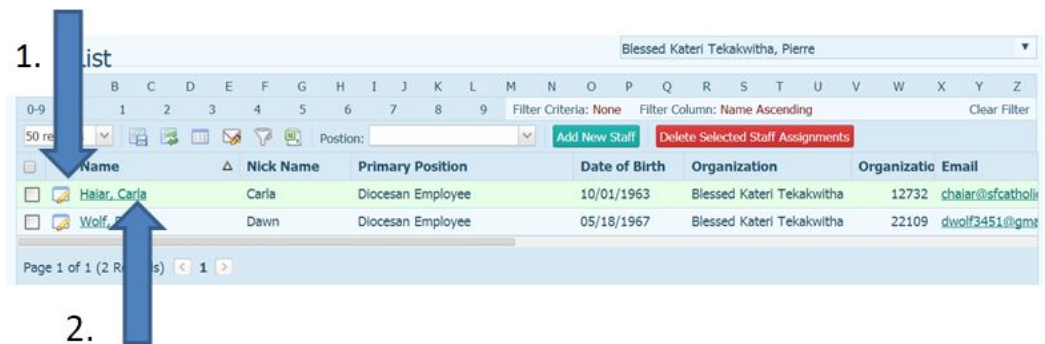
Organization Admin's have the rights to manage the staff list for an organization. Let's see how to add someone to your Staff List and enable logins for CN Family Suite.





1. Click on Administration
2. Click on Manage Staff

If you do not see these tabs available, you do not have Organization Admin rights. You will need to contact ParishSOFT to update your rights to the elevated level of Admin.



1. Clicking on the Edit icon (spreadsheet with pencil) will open the MEMBER record associated with the assignment in the selected parish.
2. Clicking on the underlined name of the person, will open the assignment record for this person in the selected parish.

Keep in mind that not all persons listed have login rights. Any assignment in your parish is listed here - even Volunteers - so the list is much longer than the actual persons with rights to login to the system. Do NOT delete these assignments, they have Safe Environment credentials attached to this member and assignment.

The screenshot shows a web application interface for managing member assignments. At the top, the member name "Haiar, Carla (109160)" is displayed. Below this are tabs for "Assignments", "Positions", "Access Rights", and "Notes". A dropdown menu shows "Holy Spirit, Volunteer Adult".

On the left, there is a form for "Additional Information" with fields for Username (chalar), SS Num, Email Address (chalar@sfcatholic.org), Email Username, Email Password (masked with asterisks), and Outgoing Mail Server. A "Reset Password" button is located below these fields. Below the form are buttons for "Add Assignment" and "Add Additional Assignment".

On the right, there is a table titled "Assignments Details" with columns for "Pri. Assignment", "Organization", "City", and "Primary Position". The table contains several rows of data, some highlighted in yellow and others in red. A pagination control at the bottom of the table shows "1 of 1 (7 f...s)" and a right arrow button.

Seven blue arrows with numbers 1 through 7 point to specific elements:

- 1. Points to the member name "Haiar, Carla (109160)".
- 2. Points to the "Assignments" tab.
- 3. Points to the "Username" field in the "Additional Information" form.
- 4. Points to the "Email Password" field in the "Additional Information" form.
- 5. Points to the "Add Additional Assignment" button.
- 6. Points to the dropdown menu showing "Holy Spirit, Volunteer Adult".
- 7. Points to the right arrow button in the pagination control.

At the bottom of the interface, there are "Edit Details" and "Close" buttons.

Click on the Member Name to display all assignments.
 1. Note the Member Id number for the staff listed. This should match the member id number on the registered and active family record. There are many duplicate records in our database, if you are unable to login after

an assignment record has been created, chances are the member id's do not match and a merge needs to be executed.

2. There are tabs across the top of the screen, click on Assignments.

3. Notice the Username, this is what will be required for logging into CN Family Suite. Use the first initial followed by full last name. This needs to be unique within our diocese. If it is a common last name, you may need to use the full first name.

4. Email information can be entered here to utilize the email features in ParishSOFT.

5. Reset password will enable you to reset the password. After you have reset the password, you need to let the user know what you set the password to. The next time they login, they will be prompted to change their password. Be sure it is four characters with two numbers. Example (pass12)

***note you need to click Edit Details before the Reset Password button is activated**

6. Take note of the parish and position in the dropdown box.

7. Note all assignments listed. This refers to the MANY assignments an individual can have within a diocese. If shaded, you are unable to edit these assignments, they have been disabled.

1. Haiar, Carla (109160)

2. Assignments Positions Access Rights Notes

Diocese of Sioux Falls, Diocesan Employee

Edit Position

Diocesan Employee

Org Directory Order Update Position

Position Notes

Position Details

Position listed at the top of the list is Primary

- Diocesan Employee
- unknown
- Adult Faith Formation Coordinator
- Assistant Youth Formation Director
- Campus Minister
- Catholic School Educator
- Catholic School Principal
- Catholic School Staff
- Catholic School Superintendent

1. Assignment and position you are displaying.

2. Positions tab has been checked.

3. Many positions can exist within an assignment. "Unknown" may pop up, this is created as a placeholder for a position when a new assignment is created.

4. Update position enables you to update the order a position is listed in your directory. This is not currently utilized in our diocese.

This is a unique screen, you need to click on Edit Details to uncheck the box next to a position that no longer applies to this assignment.

The top position entered is the Primary assignment. This is CRITICAL in understanding how rights are assigned. Be sure the most prominent position is listed first.

You can click on a position and DRAG it to its right place in the list.



1. Access Rights tab will be selected.
2. Assignment and position of rights currently displayed.
3. Start Date of assignment. If End Date is filled in this assignment is NOT active.
4. Box of Primary Assignment is very important - check this for the assignment that has login rights.
5. You will need to click on Edit Details to make any changes to access rights.
6. The ConnectNow Access button needs to be checked to login in CN Family Suite.
7. Assign appropriate rights by checking the corresponding boxes.

Table entries and lookup table management can only be changed by an Organization Admin. Therefore, you may need to grant your Religious Education persons rights to Organization Admin. This checks ALL boxes on the form but you can UNCHECK those for Offering and other updates that do not apply to this individual.

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