How to Effectively Manage Staff and Permissions in ParishSOFT Family Suite

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Today's Agenda

- **Importance of Permissions**

- **What is Appropriate Access?**
  - Permission Guidelines

- **Best Practices**

- **Types of Access**

- **Granting Access**

- **Ending Access**

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Importance of Permissions

Why do we n**eed** p**ermissions?**

- 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.

    Trust just simply is not an acceptable security strategy.

- 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.

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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**

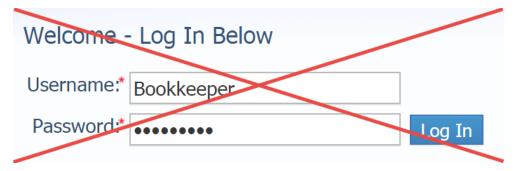- **https://www.parishsoft.com/news/where-are-you-with-email/**

Best Practices

👍 **Use Individual Accounts with Unique Logins**

Welcome - Log In Below

Username:*	Last.First
Password:*	••••••••

Log In

👎 **NOT** shared accounts

Welcome - Log In Below

Username:*	Bookkeeper
Password:*	••••••••

Log In

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: <u>Suspense Reviewer</u>

Types of Access: ParishSOFT Module Access

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

Granting Access

Granting Access

Granting Access

Granting Access

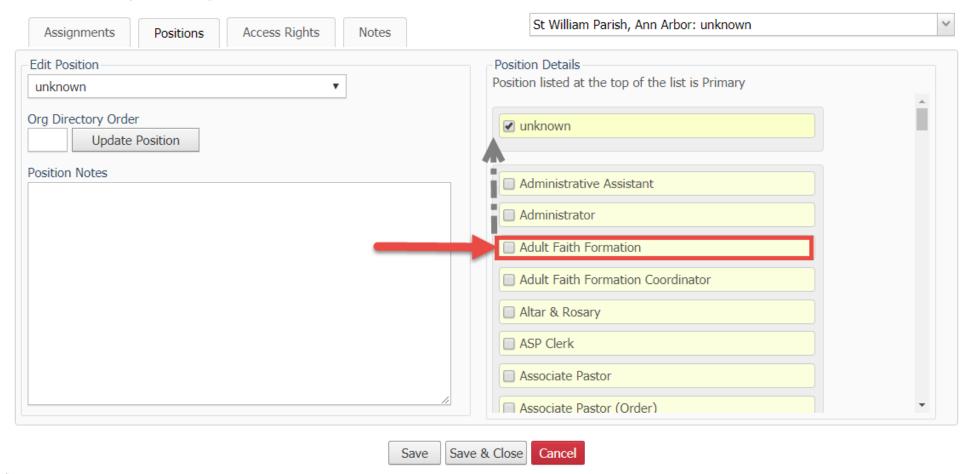# Granting Access: Assignments

Abler, Jason (1000020)

| Assignments | Positions | Access Rights | Notes |

St William Parish, Ann Arbor: unknown ▼

Additional Information

Username:* [   ]

SS Num: [   ]

Email Address:* [abler@demoemailaddres]

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
☑	St William Parish	Ann Arbor	unknown	5/25/2018	

1 of 1 (1 Assignments) ‹ **1** ›

[Edit Details] [Close]

Granting Access: Assignments

Granting Access: Positions

Granting Access: Positions

Granting Access: Positions

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Granting Access: Positions

Abler, Jason (1000020)

| Assignments | **Positions** | Access Rights | Notes |

St William Parish, Ann Arbor: unknown ▼

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

Granting Access

Ending Access

Ending Access

Ending Access

Reset Password

Reset Password

Reset Password

Reset Password

Reset Password

Reset Password

Thank you!

Elaine Tank
ParishSOFT