Adding Staff Members into ParishSOFT

Staff members are any person that works at the parish (paid or volunteer) whether they use ParishSOFT or not. All staff members should be added into the parish database, so that the database is an accurate representation of those working in the parish. If a member will not have access into ParishSOFT, you can designate them by not giving them a login.

If a staff member is not a current member of the parish, they will still need to be added prior to making them a “staff” member in the Staff Management screen. This ensures that the staff person is designated with a status (even if they are “Non-Registered” and “Staff”) and that the records have the correct designations when the database transfers to a synching environment.

1. Click on ParishSOFT Family Directory icon
2. Click on Staff > Manage Staff List to get to the Managing Staff area
3. On the Staff Management screen, notice the login names listed on the left and their individual Access Rights and Staff Details on the right, listed under those 2 tabs.

4. There will always be some “standard” staff members to each database, Exclusive Admin and System Admin. Exclusive Admin is used when an admin person wishes to run database maintenance functions on the database. This will lock out any other user from the database. System Admin. is a login used by the Diocese when members at a parish may have lost their passwords and need assistance re-setting them.
5. To add in staff members, click on Add User in the bottom left corner.
6. The screen below opens. Type in the Last name or first few letters of it and click Search.
7. You should see all the individuals in the system that match the letters you entered. Find the staff member, highlight their record so you see them in the **Selected Person** window and click **Accept**. (you will never use the Create New button on this screen as it creates a new member in your system which will duplicate the member that is already present in your database)
8. Next, you will see the new staff member listed on the left side of your screen. See example below. Now you will want to set their **Access Rights** and their **Staff Details**

![Staff Management: Ms. Amanda Abing](image)

9. Click and highlight the staff member and on the right side select the permissions you wish them to have. (less is better than more, usually is a good rule) When you’re finished selecting their rights, click **Update** on the bottom left side. Suggestions for staff rights are listed in the ParishSOFT SOP. *Please consider limiting the use of the **Delete** function in the Access Rights area for select individuals in the parish.*

10. When updating the **Staff Details** tab, sometimes the staff member will default to the top of the list. Verify that you have the correct staff member, or re-select them from the left side before editing the information. Please fill in as much as possible.