Parish Administrator User Security

Introduction

This document intends to explain how to setup new Gabriel users and assign them the appropriate level of access. Data security best practices dictate that users are given the least amount of access to data such that they are able to accomplish their tasks successfully. Users that do not require complete access to all data and functions (Church Administrator function) should be given access to the functions they require.

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User Registration

Before you can configure a user's access, they must go through the Gabriel User Registration process. Each user is required to have their own login to Gabriel. *Sharing of user credentials is not allowed and a violation of the Gabriel subscription agreement*.

Have your user browse to the registration page here:
https://app.gabrielsoft.com/account/register

Their email address will be there username. Passwords must be at least 6 characters contain at least 1 uppercase letter, at least 1 lowercase letter, at least 1 number, and at least 1 special character. Spaces can be used and we often recommend a sentence like: Tommy is 6!

Once they complete the form and submit it they will receive an email. If they do not receive it have them check their junk or spam folder.

The email will contain a link that they will need to click. They will login with their email and the password they just created. Then they will select the diocese and parish that they are working for.

Once they have completed this step they will not be able to go any further until an administrator can approve their access and set the proper security rights.

Approving a User's Registration
Once they have completed registration through the selecting of their diocese and parish, the user now needs to be approved by a parish administrator. To see those users awaiting approval, you will use the Administrative drop down menu and select User Security as shown below.

Once on the User Security screen you will see users awaiting approval appear at the top.

Click the Approve link next to their name or if this is not an authorized user you can select Reject.

When you click Approve you will be brought into the user security profile where you will be able to assign access rights. Depending on the user's role you will want to assign appropriate access rights. The next session will talk about typical parish roles and suggested security rights for that role.

We recognize that in some parishes people may have more than one function. If that is the case you can select additional access rights for that person.

Gabriel User Roles
There are three Gabriel user roles within each of the applications functional areas that include Families, Committees, Fund Raising (offertory), Religious Ed, Ministry Scheduling. Within each functional area you can have users with a **Manager** role which allows them to add families/committees/funds/re classes/services (etc.) or a **Helper** role which restricts their ability to entering transactions such as adding an existing member to a committee or adding a contribution batch. Helpers are unable to setup a new contribution fund or add a new family. The third role *Reports* is not currently in use.

You can see these Gabriel User Roles are clearly shown in three columns on the security access screen shown below. You will use a combination of these roles to properly assign rights to your users.
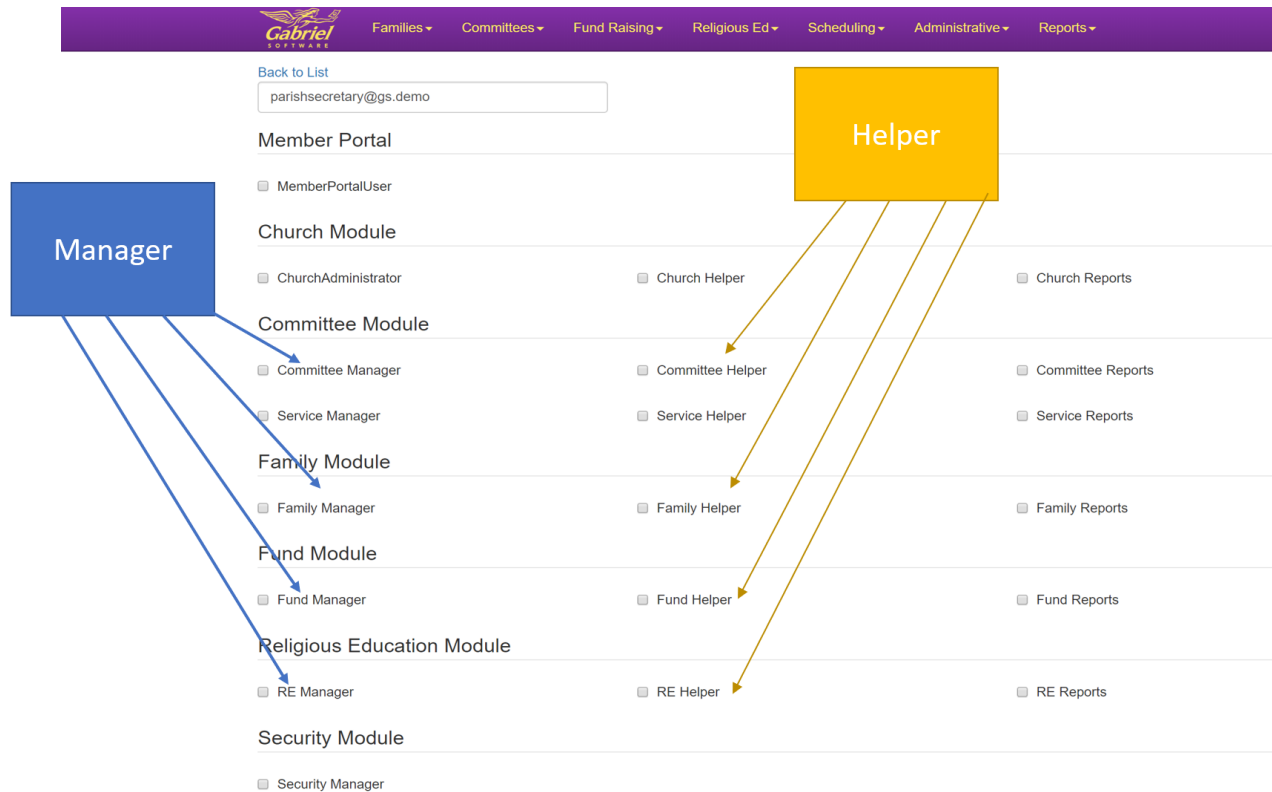
Parish User Roles

In this section, we will highlight a few typical parish roles and show you how to set their security within Gabriel.
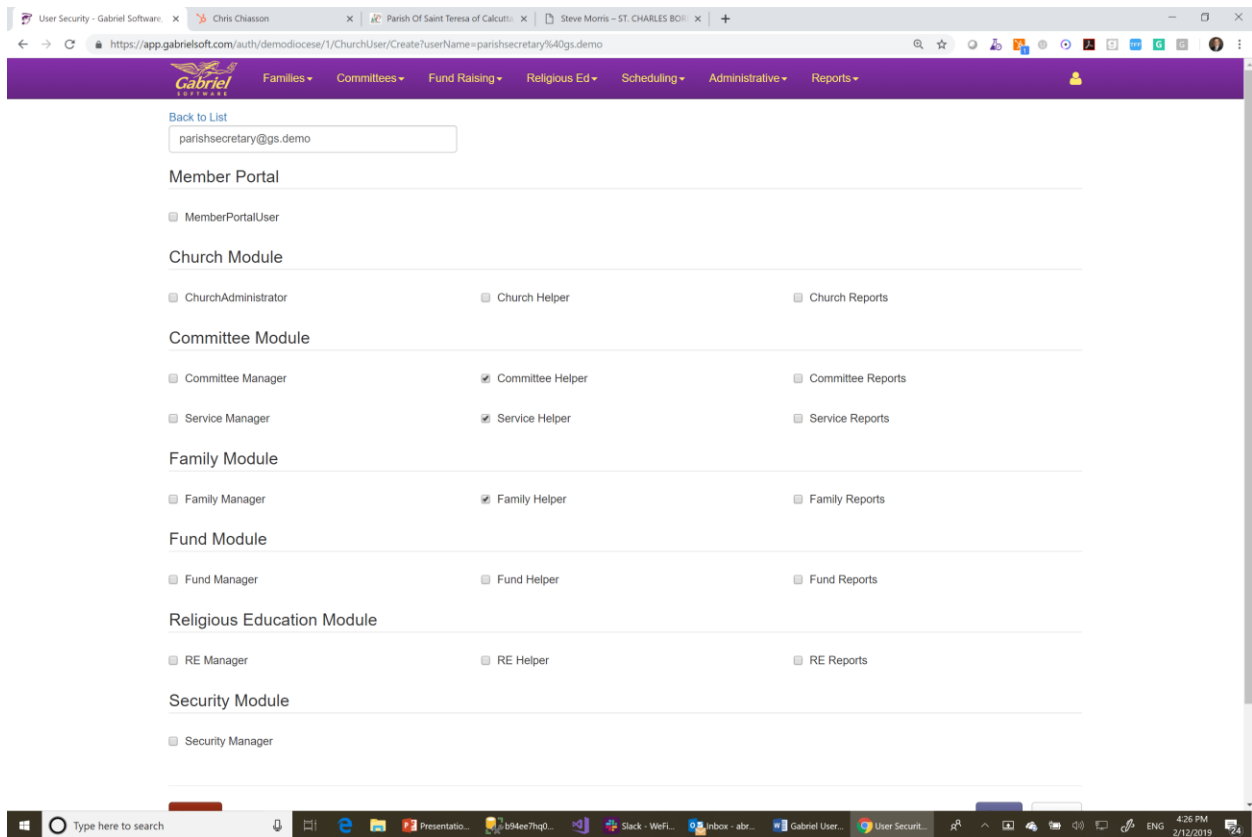
Church Administrator

The first role to be setup in a parish is the Church Administrator. This person has access to all functions within the application including User Security where they can approve user registrations and assign user access rights.

To set someone up as a Church Administrator you only need to check the Church Administrator option. You do NOT need to check all the options on the screen. This one check box will give them access to everything.
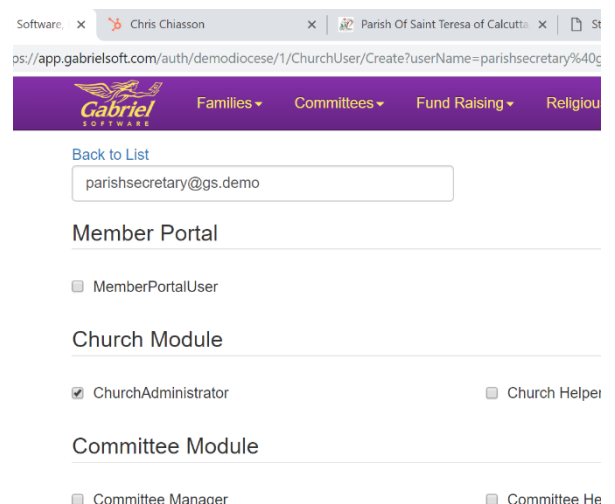
Receptionist

This person might be the person that sits at the front desk, answers the phone and greets people that come in to the parish office. You may want this person to have access to the system to look up information on families, committees and the ministry schedule. You may not want them to be able to enter families and see contribution information. If this is the case we would suggest the following settings: *Families Helper, Committees Helper*
Service Helper (Ministry Schedule)

Ministry Scheduler

The Ministry Scheduler will need the ability to setup the Mass schedule (Service Maintenance), setup the committees being scheduled and add members to the committees and set their Mass preference times. They are not allowed to add families but they can add members to families. For this person we would suggest the following access rights: *Families Helper Committees Manager, Service Manager(Ministry Schedule)*
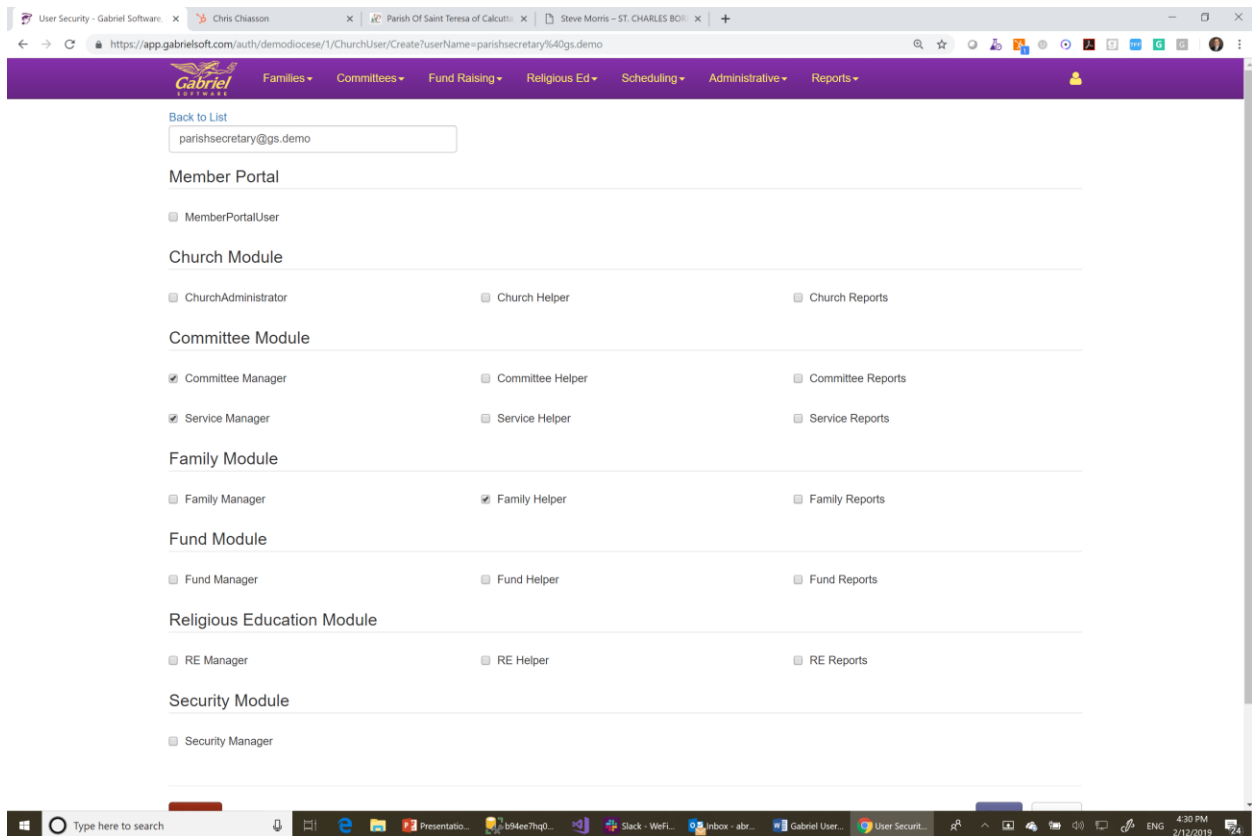
Bookkeeper

In most cases the Bookkeeper will be provided with the Church Administrator role and have access to the entire system. If this role is more focused on Offertory and Contributions and perhaps you do not wish them to have access to Religious Ed or the ministry schedule you could set them up with the following access rights: *Families Manager, Fund Manager*
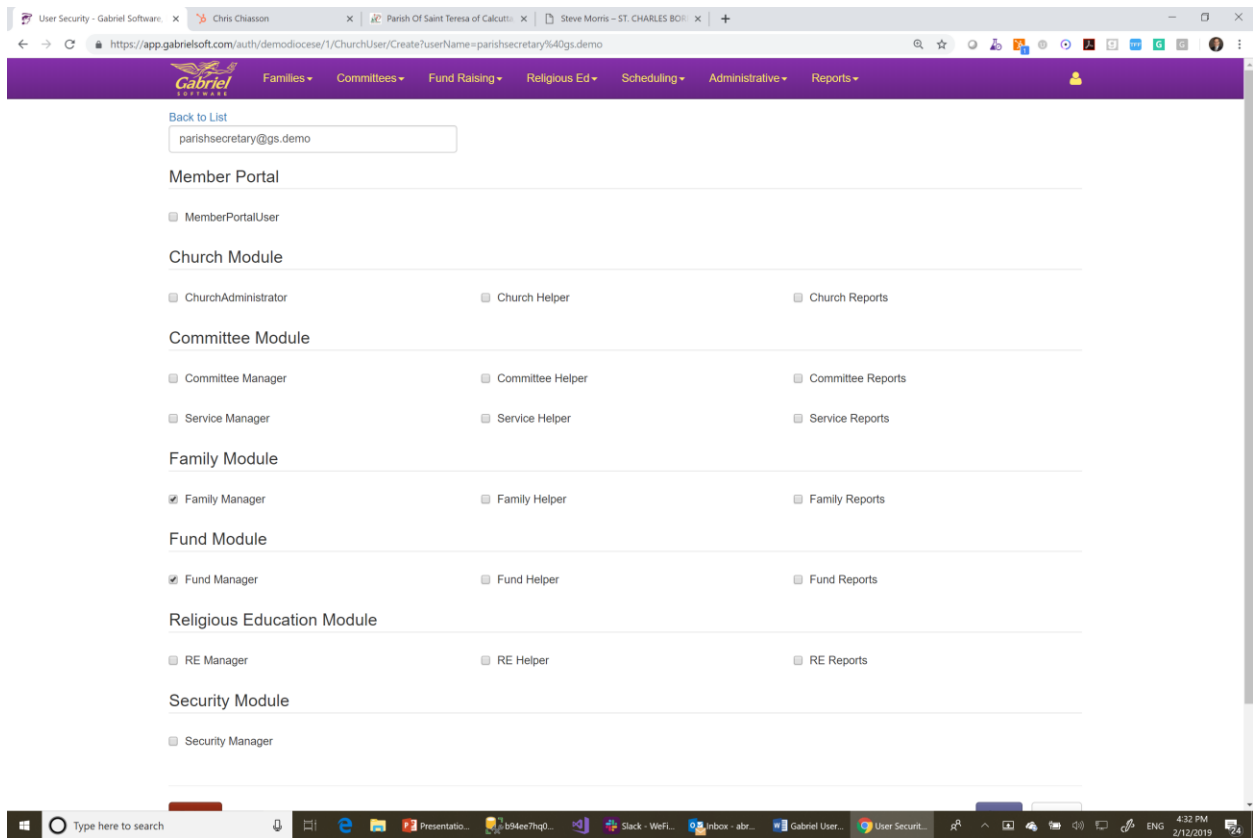

Offertory Assistant

If you have a volunteer who comes in to enter the envelope contributions each week they can be setup with *Family Helper and Fund Helper*. This will allow them to look up families but they won't be able to see their total giving (contributions, pledges tab) only their family and member contact information and envelope number. The Fund Helper role will allow them to enter contributions directly into a Fund or enter and post Contribution Batches.
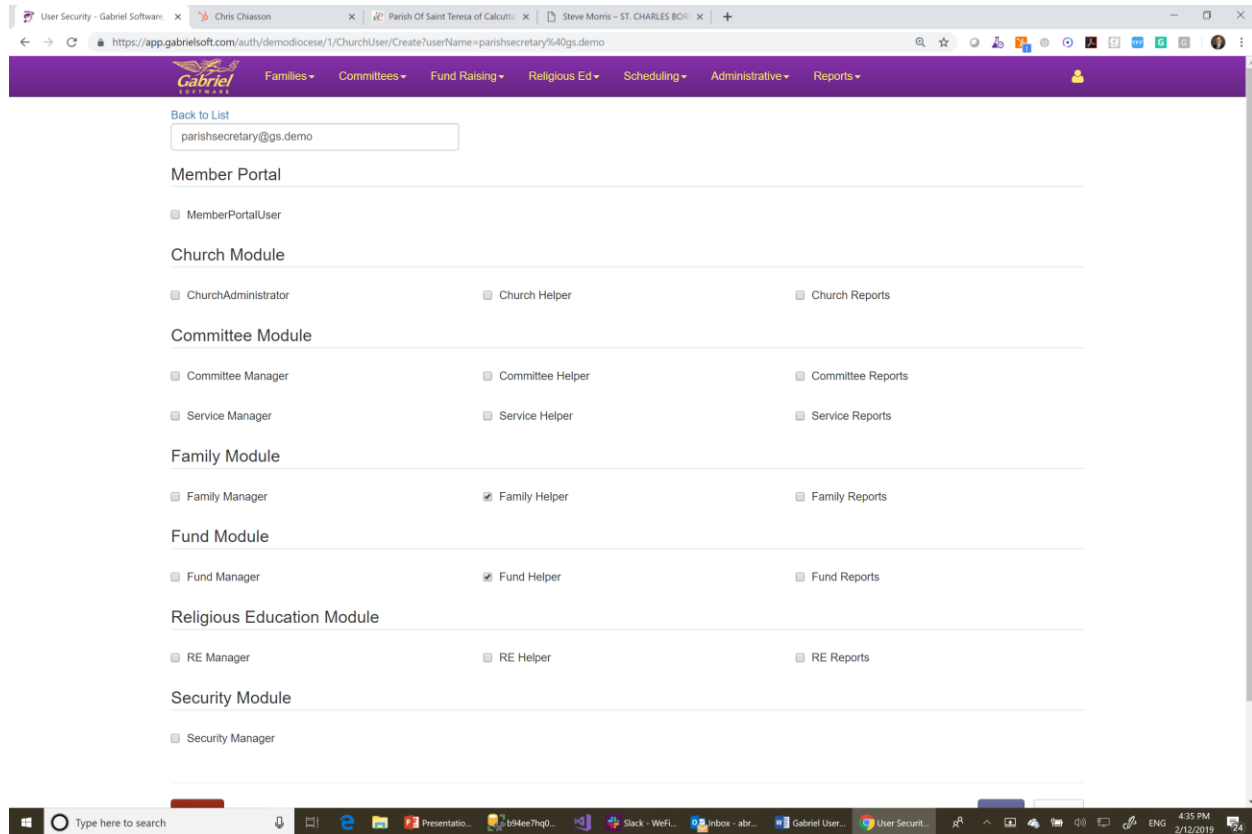
Director of Religious Education (DRE)

Depending on the parish, some DREs are given the ability to enter new families as often times they are the first person a family may encounter as they are registering for Religious Ed classes. If this is the case then you will want the DRE to have *Family Manager* access.

If the DRE is not supposed to be able to enter new families then you will give them *Family Helper* access which will allow them to add members to existing families and add the members to committees usually the Religious Ed Teacher, Student and Aide committees. We also suggest having them as a *Committee Helper* so that they can email and download their committee member information from Committee Maintenance.

Lastly you will need to provide the DRE with RE Manager rights. This will allow them to manage the rooms, levels (grades) and classes within the Religious Ed functional area.

In most cases the DRE will not need any access (Manager or Helper) to the Fund area. A typical DRE profile might look like this.
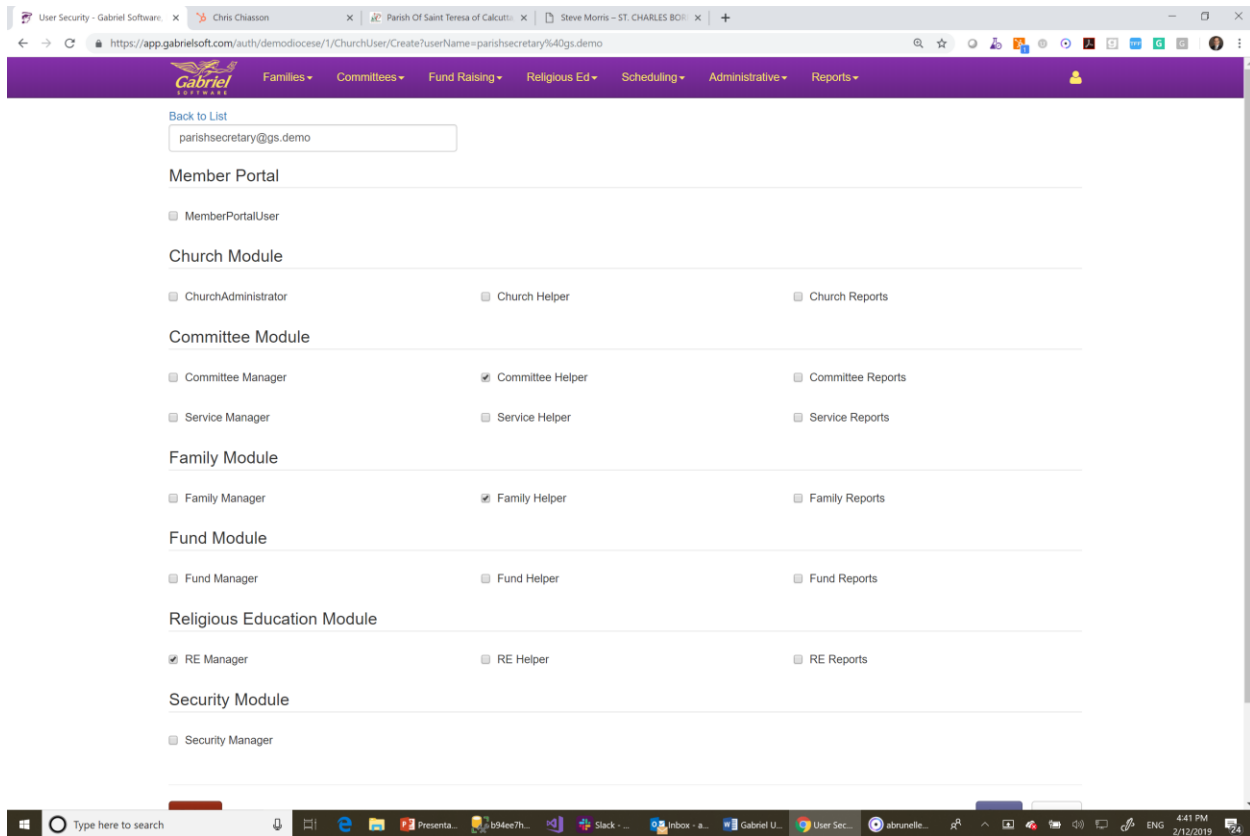
Religious Ed Assistant

A Religious Ed assistant can be granted RE Helper access which will allow them to enter and manage classes, mark students as absent and look up families and members via family search. They will not be able to access Family or Member Maintenance.

Committee Manager

If you have a lay person in charge of a committee you can provide them with *Family Helper* and *Committee Helper* access. This will allow them to enter members to existing families and add members to committees without them seeing contribution or Religious Ed data. They will also have the ability to

email their committee and download lists. **NOTE**-they will be able to see <u>ALL committees</u> not just their committee.

We have an enhancement to our Member Portal that will allow users to be added as a Committee Manager. The enhancement will allow members to be added to committees via Committee Maintenance instead of users having to go into Member Maintenance to add members to a committee. This will change the Committee Manager's security profile back to a Member Portal User only.

Until these enhancements are made to the product you will need to configure their access to Family Helper and Committee Helper as shown below.