



VERSION 4.4.4 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.4.4 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

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ParishSOFT Family Suite

Family Directory

Updates and Enhancements

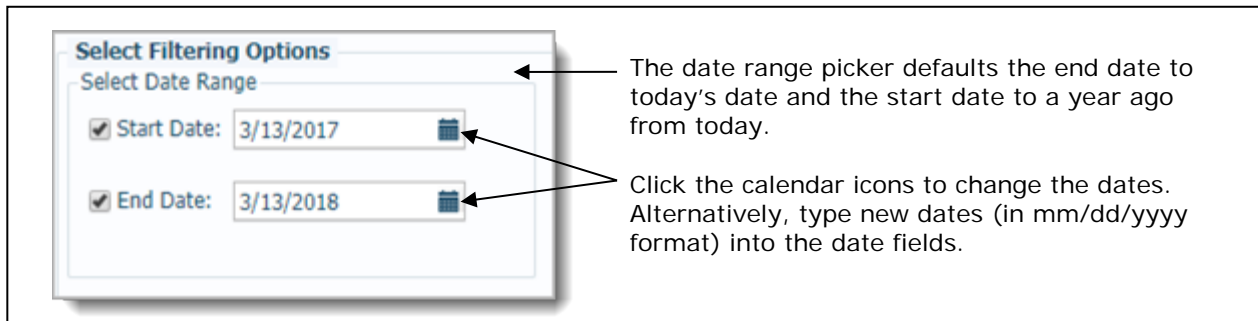
Reports

Format Options Added to Sacrament Report Setup

Two report format options are now available in the setup for all sacrament reports:

- **Condensed:** this option is designed to save paper because it uses a wider page layout that enables you to print approximately 10 records per page. The system keeps the contents of individual records together and does not split the contents across pages. If information in a column is too long to display in the allotted space, it wraps to the next line. This version of the report is suitable for a parish to submit to the diocese.
- **Expanded:** this option follows the format of the legacy desktop system's sacramental register. Prints one to two records per page.

After you select a format option, use the date picker to create a list of sacraments that took place within a given date range. For all reports the default **End Date** value is set to today's date, and the default **Start Date** value is set to today's date in the previous year (see illustration below). You can change the date range to meet your needs.



Resolved Issues

Family List

Updates to Non-Address Fields No Longer Trigger a False Address Change Notification

Previously, a change to any field in the family record incorrectly triggered an address change notification, which was then sent to all organizations the family was associated with. We fixed this issue. The system now sends an address change notification only when an address field is modified.

Adding Unregistered Families No Longer Triggers a False Address Change Notification

Previously, adding a family as **Unregistered** incorrectly triggered an address change notification, which was sent to all organizations the family was associated with. We fixed this issue. The system now sends an address change notification only when an address field is modified.

Family Details

Giving History Navigation Improved

We improved Giving History navigation within the family record. Previously, as expected, clicking the [Giving History](#) link within the family record opened a window showing the family's giving history details. However, closing the window unexpectedly returned the user to the **Family List**. Now, after the user closes the **Giving History** window, the system returns the user to the starting location: the family record.

Member List

Apostrophes Now Accepted in Student and Leader Notes Fields

Previously, the user received an `Invalid Character` error when trying to save a student or leader note that contained an apostrophe. We fixed this error. The apostrophe is now accepted in both types of notes.

Member Details

Celebrants Dropdown List Updated to Show Currently Selected Organization's Celebrants Only

Previously, if a sacrament was created at a member's former organization and then edited later at the member's current organization, the **Celebrants** dropdown list either showed names of celebrants from the former organization or no celebrant names at all. The list should have shown the names of celebrants associated with the member's current organization. We fixed this issue. If a celebrant was specified by the member's former organization, that celebrant's name is now displayed in the **Celebrant** field. The current organization can either keep that celebrant's name or change it by selecting a celebrant in the current organization.

Reports

Custom Organizations for Baptisms Now Show in the Confirmation Sacrament Report

Previously, the confirmation sacrament report did not show the names of custom organizations in the **Baptism Location** field. We fixed this issue.

Religious Education

Updates and Enhancements

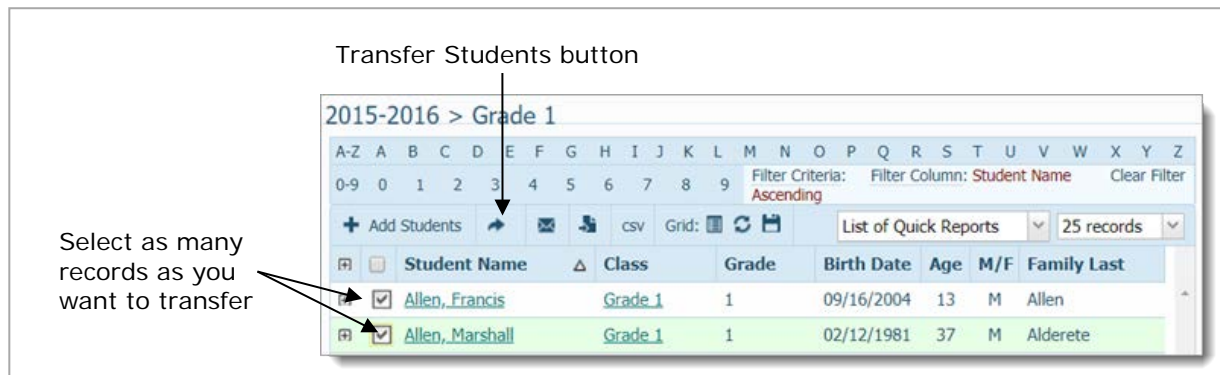
Student Directory

Bulk Student Transfer Process Added


Previously, the Transfer Students process individually moved student records from one class to another. To improve efficiency, we updated the process to enable you to do a bulk transfer of student records.

To transfer multiple records in bulk:

1. In the **Class** list in the left panel, select the class the students are currently enrolled in.
The grid in the right panel displays the names of students in the class.
2. Select the checkbox next to the name of each student you want to transfer.



The Transfer Students button  in the toolbar is activated.

3. Click  (Transfer Students).
The **Bulk Transfer Student** window opens.
4. Complete the following:
 - a) Review the details for the transfer-from class (Step 1).
 - b) Select the term, class, and grade for the transfer-to class (Step 2).
 - c) Click **Transfer Students**.

The system does the following:

- ❖ If the schedule dates exist and match between the transfer-from class and the transfer-to class, moves the selected students to the new class and removes their records from the original class. Student attendance history, notes, and class cancellation details are also transferred.

Note

When both the transfer-from class and transfer-to class have schedules in place that match exactly, the system can quickly remove students and transfer them to the new class without the need for your intervention, thus saving you lots of time.

- ❖ If the dates of the transfer-from class and the transfer-to class do not match, stops the transfer and prompts you to add missing dates. After you do this, try the transfer again.
- ❖ If the transfer-from class has no schedule (therefore, no attendance history), moves the selected students along with notes—if they exist—to the transfer-to class.

Classes

Transfer Students Process Updated to Handle Bulk Transfers

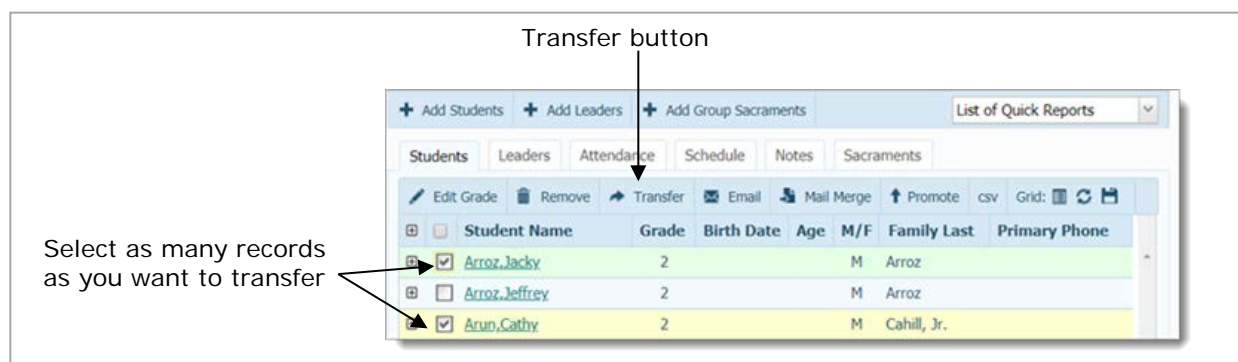
Previously, the Transfer Students process individually moved student records from one class to another. To improve efficiency, we updated the process to enable you to do a bulk transfer of student records to a class.

To transfer multiple students in bulk:

1. In the **Class** list in the left panel, select the class the students are currently enrolled in.

The grid in the right panel displays the names of students in the class.

2. Select the checkbox next to the name of each student you want to transfer.



The Transfer button in the toolbar is activated.

3. Click .

The **Bulk Transfer Student** window opens.

4. Complete the following:
 - a) Review the details for the transfer-from class (Step 1).
 - b) Select the term, class, and grade for the transfer-to class (Step 2).
 - c) Click **Transfer Students**.

The system does the following:

- ❖ If the schedule dates exist and match between the transfer-from class and the transfer-to class, moves the selected students to the new class and removes their records from the original class. Student attendance history, notes, and class cancellation details are also transferred.

Note

When both the transfer-from class and transfer-to class have schedules in place that match exactly, the system can quickly remove students and transfer them to the new class without the need for your intervention, thus saving you lots of time.

- ❖ If the dates of the transfer-from class and the transfer-to class do not match, stops the transfer and prompts you to add missing dates. After you do this, try the transfer again.
- ❖ If the transfer-from class has no schedule (therefore, no attendance history), moves the selected students along with notes—if they exist—to the transfer-to class.

Reports

Attendance Sheets and Records Updated

Per customer request, we updated the attendance sheets to show the names of class leaders and the class location (both the building and room name).

Class: Attendance Records																						
Church of The Transfiguration Mountain View, CA																						
Class: Catechism Grade: 3 Room: 101 Building: Education Wing Term: 2014-2015																						
Leaders: Ana Abreu																						
Attendance Records		Students: 5					C Class Canceled					✓ Present			T : Tardy		x Absent		E : Excused			
Student	8/7	8/14	8/21	8/28	9/4	9/11	9/18	9/25	10/2	10/9	10/16	10/23	10/30	11/6	11/13	11/20	11/27	12/4	12/11	12/18	12/25	
Geborski, Dominik	✓																					
Leon, Emilia	✓																					
Rios, Aidan-Jude	✓																					
Swenson, Elizabeth	x																					
Uram, Taylor	✓																					

Attendance Records Now Indicate Canceled Classes

The attendance records for a class now display a "C" in the date column to indicate that the class was canceled on that date. At the top of the report, we added this legend item to explain what the "C" represents: C Class Canceled.

Class: Attendance Records																								
Church of The Transfiguration Mountain View, CA																								
Class: Grade 2 Grade: 2 Room: Building: Term: 2015-2016																								
Leaders:																								
Attendance Records		Students: 12										C Class Canceled		✓ Present		T : Tardy		x Absent		E : Excused				
Student	8/2	8/9	8/16	8/23	8/30	9/6	9/13	9/20	9/27	10/4	10/11	10/18	10/25	11/1	11/8	11/15	11/22	11/29	12/6	12/13	12/20			
Arroz, Jacky	✓	C																						
Arroz, Jeffrey	x	C																						
Arun, Cathy	x	C																						
asdf, asdf	✓	C																						
Ash, Steven	✓	C																						
Ash, Teresa	✓	C																						
Audino, Louis	✓	C																						
Audino, Madeline	✓	C																						
Avila, C.A.	✓	C																						
Avram, Jean	✓	C																						
Aylsworth, Avery	✓	C																						
Aylsworth, Clare	✓	C																						

Resolved Issues


Dashboard

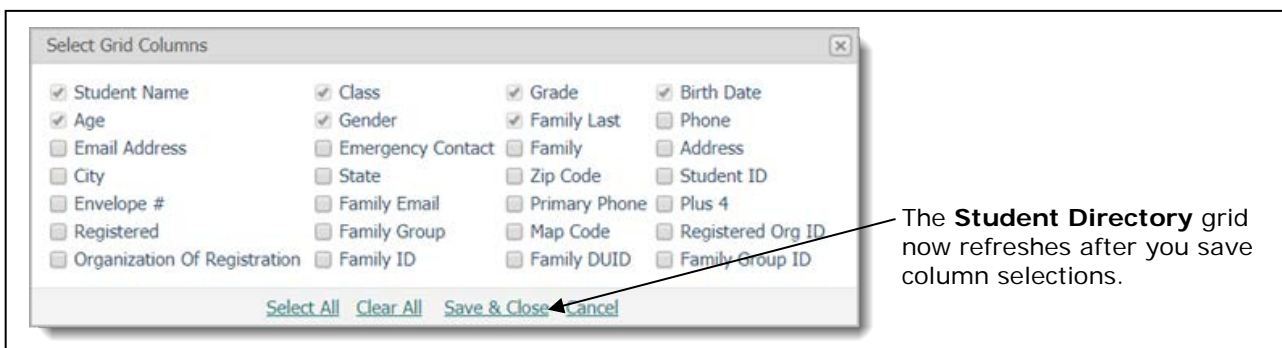
View Button in the Room Calendar Window Now Works As Expected

Previously, the **View** button in the Room Calendar window did not work. After the user clicked the button, the Room Calendar window closed instead of displaying the calendar for the selected room. We fixed this issue.

Student Directory

Premature Refresh of the Grid's Contents Resolved

We resolved an issue that caused the system to prematurely refresh the contents of the **Student Directory** grid immediately after the user clicked  (Select Grid Columns). We fixed this issue so that the grid only refreshes after grid column selections are saved. An outcome of this fix is that it results in an overall increase in application performance.



Classes

System Now Loads Students Grid with Students in the Selected Grade Only

Previously on the **Class List** tab, if the user selected to view classes by grade and then selected a grade within the class, the system loaded the **Students** grid with the names of all students in the class instead of just the students in the selected grade. We fixed this issue. Now, as expected, the system loads only the names of students in the selected grade.


System No Longer Becomes Unresponsive After Room Name Already Exists Error

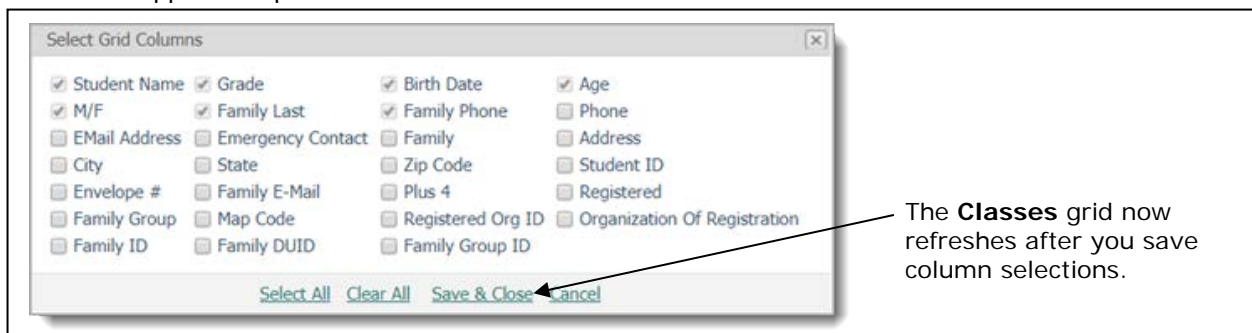
Previously on the **Manage Schedule** page (**Classes** > **Schedule** > **Manage Full Schedule**), if the user tried to add a room with the same name as an existing room, the system displayed this message:

Room name already exists.

After the user dismissed the message, the system became unresponsive. We fixed this issue. After the message is dismissed, the system now returns to the **Add Room** window to enable the user to enter a unique room name.

Premature Grid Refresh Resolved

We resolved an issue that caused the system to prematurely refresh the contents of the **Classes** grid immediately after the user clicked  (Select Grid Columns). We fixed this issue so that the grid only refreshes after grid column selections are saved. An outcome of this fix is that it results in an overall increase in application performance.



'Add Students' Window Now Shows Completely

Previously, the **Add Students** window did not show completely if the user's browser was set to less than full-screen size. As a result, the **Add Student** button was not visible, which prevented users from being able to add students to a class. We fixed this issue.

Error Experienced When Adding Students to Classes Fixed

We resolved an issue that caused users to experience an error when trying to add a student with missing age data to a class. We fixed this issue. Students with no age data can now be added to a class.

Names of Deceased and Deleted Parents Removed


Except for sacramental records, the names of deceased parents were removed from wherever they appeared throughout the application (for example, on pre-populated registration forms and in reports). Note that only names of the deceased that were automatically linked from the **Father Name** and **Mother Name** fields in a member's record were removed. If a deceased parent's name was originally entered manually into the system, the name still appears and must manually be removed.

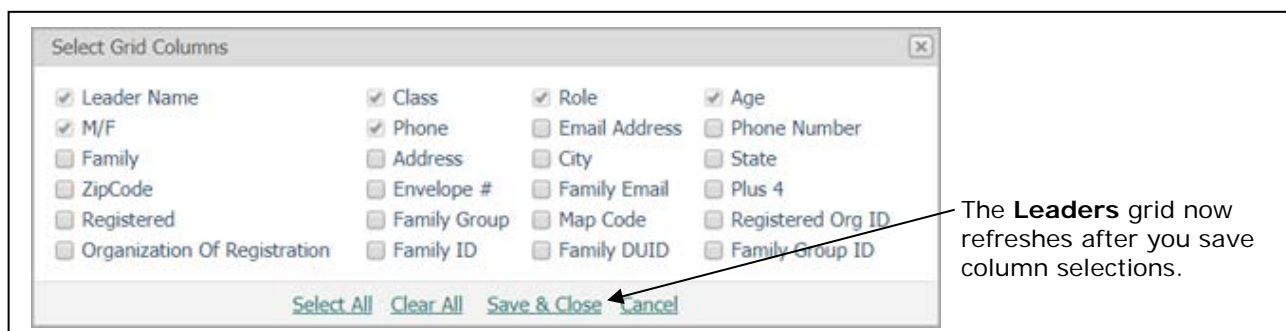
Student Count for Classes on the Class List Tab Corrected

Previously on the **Class List** tab, the number of students shown as enrolled in a class differed from the number shown as currently enrolled. The system incorrectly included deleted students in the enrollment count. We fixed this discrepancy.

Leaders

Premature Grid Refresh Resolved

We resolved an issue that caused the system to prematurely refresh the contents of the **Leaders** grid immediately after the user clicked  (Select Grid Columns). We fixed this issue so that the grid only refreshes after grid column selections are saved. An outcome of this fix is that it results in an overall increase in application performance.

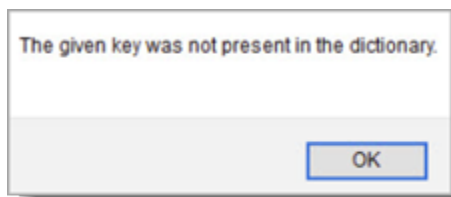


Duplicate Leader Records in Grid Eliminated

Previously, several of the **Leaders** grids and lists in the application contained duplicate records. We resolved the issue that caused the duplication.

'Leaders by Role' Quick Report No Longer Generates an Error

Previously, if users tried to run a Leader List (By Role) quick report with the **View By > Role** option selected on the **Class List** tab, the system generated this error:



We fixed this issue. Users can now run the quick report successfully.

Reports

Discrepancy Between Reported Family Totals Resolved

Previously, when the **Unregistered Active** or **Inactive** filter was applied either to the **Families** grid (in the Registration Forms report setup) or the **Family List** grid (Family Directory), the total number of filtered families for each grid was different when it should have been the same. We fixed this discrepancy.

Configuration

Renaming a Term No Longer Causes Pending Registrations to Be Lost

Previously if the user renamed a term, any pending registrations associated with the term before the name change were lost. We fixed this issue. The system now copies registrations associated with the originally named term to the newly named term.

Double-Clicking the Save Button No Longer Duplicates Dates for a Session

Previously when saving a session, if the user accidentally double-clicked the **Save** button, the system duplicated the session's dates. We added a control to ensure that double-clicks of the **Save** button no longer cause the system to duplicate dates for a session.

Offering

Resolved Issues

Batches

Controls Added to Prevent Deletion of Quick Entry Batches Containing Transactions

On the **Batch Management** page, we added a control to prevent users from deleting quick entry batches containing contributions or pledges.

Reports

Member Contributions Imported from ParishSOFT Giving Now Show in Contribution Statements

Previously, contribution statements configured to include member contributions were missing member contributions imported from ParishSOFT Giving. We fixed this issue. If a member specifies that family member contributions should be included on the statement and those contributions came from ParishSOFT Giving, they are now shown.

Diocesan Development

Updates and Enhancements

Parish Reports

'Expected Final Payment Date' Column Added to CSV Version of the Parish Master Report

As shown below, we added a new column, labeled **Expected Final Payment Date**, to the CSV version of the Parish Master report:

Parish Reg	Last Payment	Date Last	Expected F	LastName	FirstNames
Church of	\$100.00	05/20/18	04/01/19	DIO-1317	DIO-1317
Church of	\$100.00	05/16/18	04/01/19	DIO-1317	DIO-1317
Church of	\$10.00	05/01/18	04/01/19	Mathew	Elizabeth
	\$45.00	06/23/18	05/01/19	Mathew	Emma
Church of	\$25.00	11/22/17	05/01/19	Mathew	Mason
Church of	\$30.00	02/02/19	02/01/19	Mathew	William
Church of	\$100.00	04/21/18	10/01/18	Menon	Poppy

This column shows the date the final payment to the pledge is expected. Note the following for each pledge listed in this report:

- If the **Last Payment Date** field contains a date, that date is also shown in the **Expected Final Payment Date** field.
- If the **Last Payment Date** field is blank, the date in the **Expected Final Payment Date** field is a projected date that is calculated by the system.

Resolved Issues

Parish Reports

Discrepancy Between Pledge Totals Fixed in PDF Version of the Parish Master Report

Previously in the PDF version of the Parish Master report, the pledge totals shown at the beginning and end of the report were calculated differently so they did not match when they should have. We fixed this discrepancy. The pledge total amount shown in both locations is now based on the same calculation, so the amounts match as expected.

'Last Payment Date' Field in the CSV Version of the Parish Master Report Corrected

Previously, in the CSV version of the Parish Master report, the **Last Payment Date** field in the CSV file showed either the date of the user's initial pledge payment or the date the pledge was created. This field should have shown the date the last contribution was made to the pledge. We corrected this error.

PDF Version of the Parish Master Report Now Includes Family Group Information for Non-Givers

We resolved an issue that caused the PDF version of the Parish Master report to be missing family group information for non-givers.

Timeout Error Experienced When Trying to Run Large All Parish Summary Reports Fixed

We resolved an issue that caused the system to occasionally generate a timeout error when users tried to run All Parish Summary reports that required processing of large amounts of data.

Donor Reports

Family Filters for Contribution Detail Statements Now Working As Expected

Previously, the Family filters in the setup for Contribution Detail Statements incorrectly filtered out certain family records and their contribution data. As a result, users were unable to generate statements for these families. We fixed the issue that caused the filtering issue.

Updates and Enhancements

Resolved Issues

Query Timeout Error Resolved

Previously, queries designed using any of the fields in the **Fund – Organization Summary** group caused the system to generate a timeout error. We fixed this issue.

Administration

Updates and Enhancements

Lookups

Pop-Up Message Displayed to Confirm Lookup Merges Revised

Previously after users submitted a request to merge lookup values, the system displayed a generic pop-up message prompting them to confirm the merge. We revised this message to now include the names of the actual records so that users can quickly verify that they selected the right records to merge.

More Robust Search Operation Now Applied to Description Column in the Celebrants Grid

Previously, text searches performed on the **Description** column in the **Celebrants** grid used “starts with” criteria, which users reported often yielded unsatisfactory results. We changed the search criteria from “starts with” to the more inclusive “contains”. With this change, users are now more likely experience better outcomes from their celebrant searches.

Manage Staff

Add New Staff Process Improved

Some users reported experiencing confusion with the Add New Staff process, stating that it sometimes led them to mistakenly create duplicate member records. We redesigned the process so that it is now much more intuitive and straightforward. Users will now find certain action buttons disabled or not visible until specific criteria are met. The redesign significantly reduces the chance of creating duplicate records. If you need instructions for adding new staff, go to this topic in the Administration online Help: *How to Add a New Staff Member*.

Resolved Issues

Lookups

System Now Accepts Lookup Values Containing Apostrophes

Previously, the user experienced an **Oops** error when trying to save lookup values containing an apostrophe. We fixed this issue.

Sacraments Tab in Member Details Now Updated with Merged Celebrant's Name

Previously after a successful merge of two celebrant records, the **Celebrant** field on the **Sacraments** tab in **Member Details** was sometimes empty when the field should have shown the name resulting from the merge. We fixed this issue. After a successful merge, the merged celebrant's name now appears on the **Sacraments** tab in **Member Details**.

'Save List Order' Command Now Working As Expected for Celebrant Lookup Values

Previously after reordering lookup values in the **Celebrants** grid and trying to save the new order, the user experienced an **Oops** error. We resolved this issue. Clicking the **Save List Order** button no longer produces this error.

ParishSOFT Diocesan Suite

System-Wide

Resolved Issues

Timeout Error Experienced When Changing Organizations Resolved

During periods of high usage, some users experienced an **Oops** error when attempting to change organizations. We fixed this issue.

Census

Updates and Enhancements

Member Details

Users Can Now Add and Edit Holy Orders Sacrament Records from Within Member Details

Previously, diocesan users could only add and edit Holy Orders sacrament records from within the **Sacraments** module. Users working in **Member Details** found that having to exit **Member Details** and then open the **Sacraments** module to perform these tasks was disruptive to their workflow. To improve workflow efficiency, we added the ability for users to add and edit Holy Orders sacrament records directly on the **Sacraments** tab in **Member Details**.

Note that to perform these tasks, the user must have an active assignment to the diocese and the following permissions enabled in his or her staff record:

- Grant Login Privileges
- Family Directory > Add/Edit

The sacrament of Holy Orders consists of three degrees (from lowest to highest):

- Diaconal
- Presbyteral
- Episcopal

In view mode, the field label shown on a sacrament record is simply "Holy Orders." After the record is put in Edit Details mode, the highest degree conferred on the member is now appended to the field label. For example, if Episcopal is the highest degree conferred, in edit mode the word "Episcopal" is appended to the field label, as shown in this illustration:



The screenshot shows a horizontal form with several fields. The first field is labeled "Holy Orders (Episcopal):" and contains a small square icon. The second field is a date field showing "2/9/2016" with a calendar icon. The third field is empty. The fourth field is a dropdown menu with a downward arrow. The fifth field is empty. The sixth field is a "Details" link with an external link icon.

Administration

Updates and Enhancements

Lookups

Lookup Management Modified and Redesigned

We determined that the existing Lookup Management functionality was no longer sufficient to meet the requirements of diocesan administrators or the needs of parish administrators who had access to multiple organizations. To address specific concerns, this release introduces a new approach to Lookup Management, designed to help the diocesan administrator more effectively manage access to and changes to Family Directory lookup data. At its core, the new approach aims to protect the integrity and security of lookup data by giving the diocesan administrator control over which data organizations within the diocese can see and modify. The new model also enforces rules that determine how that data can be changed.

Understanding Roles and Permissions

User roles now matter in Lookup Management as they are critical for managing access to Lookup Management and protecting changes to Family Directory lookup data. Within Lookup Management, two key roles are pre-defined: diocesan administrator and organization administrator Table 1 defines the requirements governing the assignment of each role. Table 2 defines specific permissions that determine what a user in the role can and cannot do when interacting with lookup data.

Table 1. Descriptions of Administrator Roles in Lookup Management

Role	Requirements
Diocesan Administrator	<p>This user must:</p> <ul style="list-style-type: none">▪ Have an active assignment to a diocese organization that is currently licensed for one or more ParishSOFT Family Suite modules. An active assignment is defined as one that:<ul style="list-style-type: none">❖ Has a start date that is neither null nor in the future❖ Has an end date that is not in the past▪ Have the Diocesan Admin access right enabled for the active assignment to the diocese.▪ Have login privileges and access to ParishSOFT Family Suite. Therefore, these options must be enabled in the staff record:<ul style="list-style-type: none">❖ Grant Login Privileges (on the Access Rights tab)❖ ParishSOFT Access (on the ParishSOFT Modules tab)

Table 1. Descriptions of Administrator Roles in Lookup Management (continued)


Role	Description
Organization Administrator	<p>This user must:</p> <ul style="list-style-type: none"> ▪ Have an active assignment to a parish organization that is currently licensed for one or more ParishSOFT Family Suite modules. An active assignment is defined as one that: <ul style="list-style-type: none"> ❖ Has a start date that is neither null nor in the future ❖ Has an end date that is not in the past ▪ Have the Organization Administrator access right enabled for the active assignment in the staff record. ▪ Have login privileges and access to ParishSOFT Family Suite. Therefore, these options must be enabled in the staff record: <ul style="list-style-type: none"> ❖ Grant Login Privileges (on the Access Rights tab) ❖ ParishSOFT Access (on the ParishSOFT Modules tab)

Table 2 shows the permissions associated with the two administrator roles.

Table 2. Lookup Management Permissions for Administrator Roles

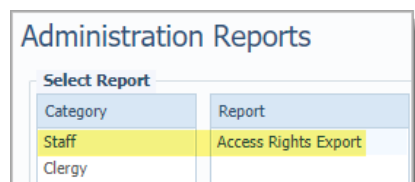
Assigned Role	Permissions
Diocesan Administrator	<ul style="list-style-type: none"> • Can access all Lookup Management tables and functionality. • Controls access to Family Directory lookup tables by all organizations within the diocese. • Controls the ability of all organizations within the diocese to modify lookup data in Family Directory lookup tables. This control is enabled by a new option visible to diocesan administrators only, that enables them to allow (or prevent) organizations to add, edit, and merge data in lookup tables. For a detailed description of the new option, see this entry: "Option Added to Give Diocesan Administrators Control over Changes to Lookup Values." • Can add and edit lookup values, both those created and owned by the diocese as well as those created and owned by all organizations within the diocese. • Can merge lookup values, both those created and owned by the diocese and those created and owned by all organizations within the diocese. In this release, a feature was added to enable merges of lookup values. For details, see this entry: "Added Ability to Merge Family Directory Lookup Values."

Table 2. Lookup Management Permissions for Administrator Roles (continued)

Assigned Role	Permissions
Organization Administrators	<ul style="list-style-type: none"> ▪ Can access Family Directory lookup tables only in organizations they have access rights to. <p style="text-align: center;"> IMPORTANT</p> <p>Access rights to organizations must be explicitly granted. Rights do not cross from one organization to another unless the organization is subordinate to the organization to which the administrator is granted access.</p> <ul style="list-style-type: none"> ▪ If a Family Directory lookup table is not locked by the diocesan administrator, can: <ul style="list-style-type: none"> ❖ Add and edit lookup values owned by the selected organization. ❖ Merge lookup values owned by the selected organization into other values owned by the selected organization. ❖ Merge lookup values owned by the selected organization into lookup values owned by the diocese. <p style="text-align: center;"><i>Note</i></p> <p><i>Specific rules apply to merges of lookup values. When rules are violated, the system now displays error messages to communicate the exact nature of a problem and describe how to resolve it.</i></p>

Running an Access Rights and Permissions Report

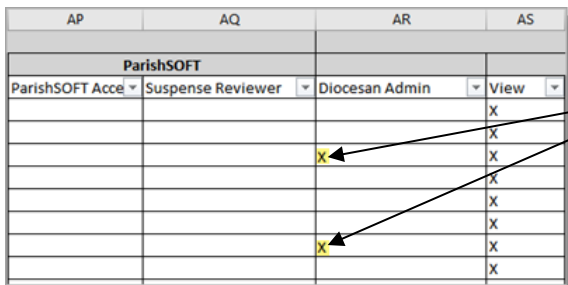
Given the permissions now enforced for Lookup Management, now is probably a good time for diocesan administrators to review access rights and application-level permissions currently assigned to diocesan staff and parish staff users. This task is easily accomplished by running an Access Rights Export report, available on the Administration Reports page:



The Access Rights Export report, added in release 4.4.3 of ParishSOFT Family Suite, allows the diocesan administrator to see the roles, access rights, and application-level permissions assigned to each staff user in the selected organization. While some users have job responsibilities that genuinely require their currently assigned roles and permissions, it is likely that some users' rights and permissions will need to be changed. As ParishSOFT Family Suite is updated in the future with new diocesan-level features, it will become even more important to ensure that only the right people have access to those features. We recommend that diocesan administrators make it a regular practice to run and review this report.

For step-by-step instructions on running a Staff Access Rights report, open the *How to Create an Access Rights Export* topic in the ParishSOFT Family Suite Administration Help.

The Access Rights Export report is easy to interpret. An **X** in a column means that a permission or access right is enabled. If, for example, you want to find out which users in the selected organization currently have Diocesan Admin access, locate the **Diocesan Admin** column (see illustration below) in the report. An **X** in this column means that the user has the **Diocesan Admin** checkbox selected in the staff record, which grants the user all privileges associated with this role (see Table 2 on page 19).



AP	AQ	AR	AS
ParishSOFT			
ParishSOFT Access	Suspense Reviewer	Diocesan Admin	View
			X
			X
		X	X
			X
			X
			X
			X
			X
			X

If you need to change an individual's access rights and permissions, open the staff record to make the appropriate changes. Be sure to save them.

Specific Enhancements to Lookup Management

Individual entries in this section detail specific enhancements made to Lookup Management in v4.4.4 of ParishSOFT Family Suite.

Option Added to Control Access and Changes to Family Directory Lookup Data

Note

The configuration option described below is available to diocesan administrators only. For a definition of the diocesan administrator role, see Table 1 on page 18.

The **Lookup Management** page now includes a control that allows a diocesan administrator to grant permission to all organizations in the diocese to add, change, and merge values in Family Directory I lookup tables.

As shown below, permission can be granted in bulk to multiple lookup tables or individually to specific tables.

In the **Configuration** section, diocesan administrators can use this link to globally allow organizations to modify Family Directory lookup tables.

Or use this option to allow modifications on a per table basis.

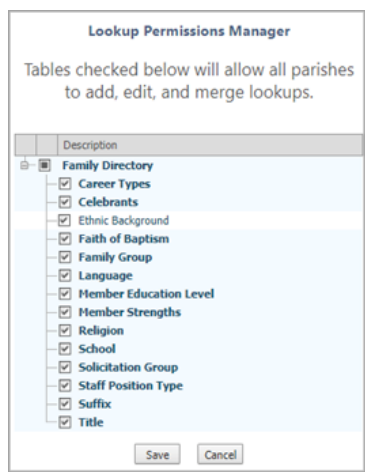
The **Configuration** section, shown in the previous illustration, accompanies each Family Directory lookup table. The section contains two permissions controls:


- [Bulk Manage Lookup Permissions](#) link: click this link to display the **Lookup Permissions Manager** menu (see illustration below). This menu lists the Family Directory lookup tables. Note that, all checkboxes are selected by default. This means that all parishes can change lookup values in all tables until the diocesan administrator chooses to block changes by removing the permission from a table.



IMPORTANT

The selections you make on the Lookup Permissions Manager menu apply to all organizations in the diocese regardless of which organization is currently selected in the Organization dropdown list.



You can remove permission by clearing a table's checkbox, and then clicking  to apply the change to all selected tables simultaneously.

- **Allow all Parishes to Add, Edit, or Merge** checkbox: by default, this checkbox is selected for each Family Directory lookup table. Therefore, parishes are allowed to change lookup values in all tables until the diocesan administrator chooses to block changes by removing the permission.

To remove the default permission, select the desired table from the **Tables** list in the left panel. Then, clear the checkbox.

User Interface Updated to Support New Lookup Management Access Requirements

We updated the Lookup Management user interface to make the content and controls more dynamic based on the access rights of the logged-in user. A dynamic user interface helps you complete tasks more quickly because it provides the right controls and information when you need them.

One noticeable change is the addition of a Show/Hide/Suppress state of buttons and information. For example, action buttons in the Lookup Management grids are now visible and activated only if the user can use the functionality they represent. In addition, content (lookup data) that is restricted is not visible at all.

The following list summarizes important changes made to the Lookup Management user interface:

- If the diocesan administrator chooses to prevent organizations from accessing a given lookup table:
 - ❖ Within grid for the table, lookup values owned by the selected organization as well as those owned by the diocese are visible. However, because access to the table is locked, these buttons do not appear:



(Add a new lookup item)




(Edit the value)



(Merge)



(List order)

- If the diocesan administrator chooses to allow organizations to access to a given lookup table:
 - ❖ The Add button  is visible and active to indicate that new lookup values can be added to the table.
 - ❖ Within the grid for the table, lookup values created and owned by the selected organization are shown. Because access to the table is permitted, the values can be edited and merged. As shown below, both the Edit and Merge buttons are visible and active to allow users to apply them to values in the grid:

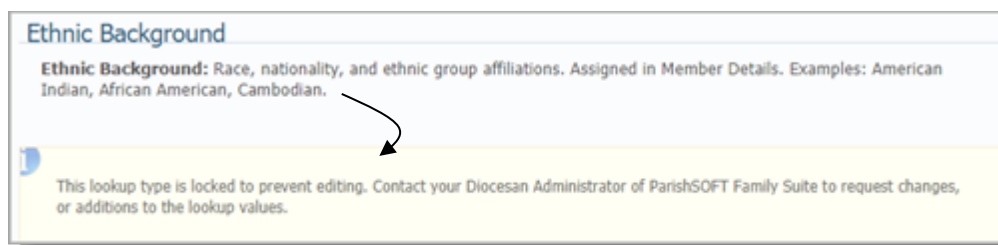


- ❖ Within the grid for the table, lookup values created and owned by the diocese are also shown. However, because these lookup values are diocesan-owned, they cannot be edited and merged. As shown below, both the Edit and Merge buttons are visible but shaded to indicate that users cannot use them:



To provide users with feedback and to help them understand the current context, we added informational components to the user interface in the form of tooltips, notifications, and messages. For example:

- If access to a given lookup table is locked, this explanatory message is now displayed to users when they select the table:



- Strict rules determine whether lookup values in Family Directory tables can be merged. When a rule is violated, the system now displays an error message to explain the issue and offers ways to solve it.

More Robust Search Operation Now Applied to Description Column in the Celebrants Grid

Previously, text searches performed on the **Description** column in the **Celebrants** grid used “starts with” criteria, which users reported often yielded unsatisfactory results. We changed the search criteria from “starts with” to the more inclusive “contains”. With this change, users are now more likely experience better outcomes from their celebrant searches.

Lookup Values Renamed for Accuracy

To improve accuracy and clarity, we made minor name changes to three lookup values in the Family Directory lookup table.

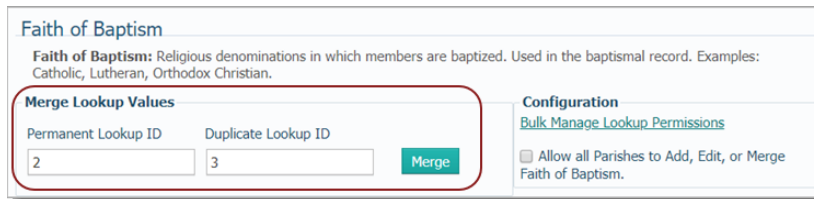
Previous Name	New Name
Education	Member Education Level
Faith	Faith of Baptism
Position Type	Staff Position Type

Descriptions of Lookup Tables Added

For each lookup table, we also added a brief description. The description informs users of the purpose of the table and indicates the module in which it is used.

Added Ability to Merge Family Directory Lookup Values

We added the ability for diocesan administrators to merge two Family Directory lookup values into one using the new **Merge Lookup Values** feature. This feature appears above each lookup table's grid:



To merge a pair of lookup values:

Note

*When a lookup value is created, it is assigned a unique ID by the system. You can find this ID in the **Lookup ID** column in the grid.*

1. In the **Tables** panel, select the desired Family Directory table.
2. Do the following:
 - a) Find the lookup value you want to keep and type its **Lookup ID** value in the **Permanent Lookup ID** field.
 - b) Find the lookup value you want to merge and type its **Lookup ID** value in the **Duplicate Lookup ID** field.

The **Merge** button is activated.




IMPORTANT

Be careful. After you merge (combine) lookup values, you cannot undo the merge.

3. Click .

The system prompts you to confirm the merge.

4. To proceed, click .

The system does the following:

- If no merge rule is violated, merges the lookup values and updates all related records accordingly.
- If a merge rule is violated, displays an error message.

5. If you received an error, fix the problem. Then, retry the merge.

Four Columns Added to Grids for Family Directory Lookup Tables

As shown in the following illustration, four new columns of information were added to the Lookup Management grids for Family Directory tables:

Note

*The columns are visible only to users who have the **Diocesan Admin** or **Organization Admin** access right enabled on an active assignment to the selected organization.*

Lookup Management

Diocese of San Jose, San Jose

Language: Native languages. Assigned in Member Details. Examples: Spanish, Korean, Hungarian.

Merge Lookup Values

Permanent Lookup ID: Duplicate Lookup ID: Merge:

Configuration

[Bulk Manage Lookup Permissions](#)

☐ Allow all Parishes to Add, Edit, or Merge Language.

10 records

	Description	# in Use	Creator Organization	Organization ID	Lookup ID
<input type="checkbox"/>	Greek	#	Diocese of San Jose, San Jose	21004	35
<input type="checkbox"/>	German	#	Diocese of San Jose, San Jose	21004	34
<input type="checkbox"/>	Galician	#	Diocese of San Jose, San Jose	21004	33
<input type="checkbox"/>	Friulian	#	Diocese of San Jose, San Jose	21004	32
<input type="checkbox"/>	French	#	Diocese of San Jose, San Jose	21004	31
<input type="checkbox"/>	Finnish	#	Diocese of San Jose, San Jose	21004	30
<input type="checkbox"/>	Farsi	#	Diocese of San Jose, San Jose	21004	29
<input type="checkbox"/>	Faroese	#	Diocese of San Jose, San Jose	21004	28
<input type="checkbox"/>	Estonian	#	Diocese of San Jose, San Jose	21004	27
<input type="checkbox"/>	Dutch	#	Diocese of San Jose, San Jose	21004	26

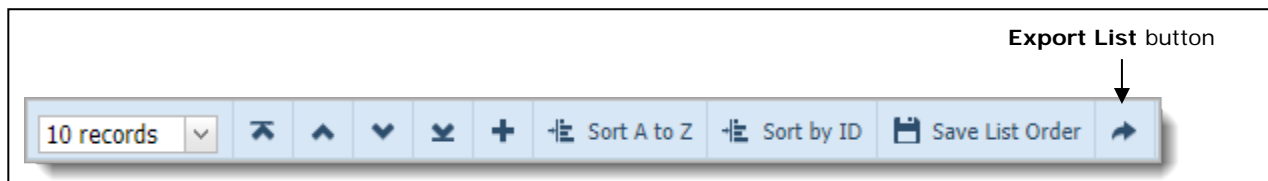
Page 13 of 15 (144 items)

New grid columns

- **# in use**: number of times the lookup value is used in your records. Click <#> to see the actual count for a given lookup value.
- **Creator Organization**: name of the organization that created and, therefore, owns the lookup value.
- **Organization ID**: ID of the organization that created the lookup value.
- **Lookup ID**: unique number assigned by the system that identifies the lookup value. This ID is used when merging lookup values (for details, see ["Added Ability to Merge Family Directory Lookup Values"](#))."


Added the Ability to Export Lookup Values to a CSV File

Diocesan administrators can now export current Family Directory lookup values from a lookup grid to a CSV file. To enable the export, we added an **Export List** button to the grid's toolbar, shown below:



To export a grid's lookup values:

1. In the **Family Directory Tables** group, select the desired lookup table.
2. Do one of the following:
 - To export specific lookup values, select the desired checkboxes.
 - To export all lookup values, leave all checkboxes empty.

3. Click  (**Export List**).

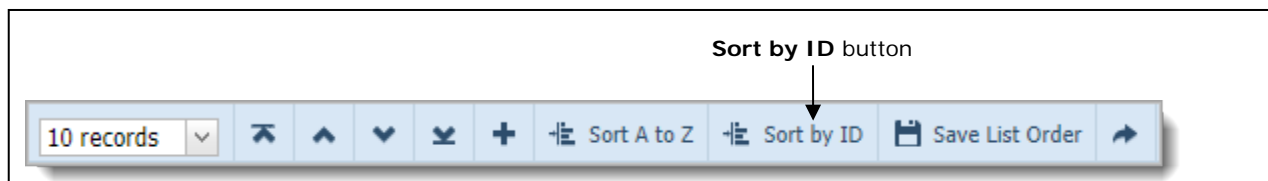
The system generates the CSV file of lookup values. The file contains these columns of information:

- **Description:** name of the lookup value.
- **# in use:** number of times the lookup value is used in your records.
- **Creator Organization:** name of the organization that created and, therefore, owns the lookup value.
- **Organization ID:** ID of the organization that created the lookup value.
- **Lookup ID:** unique number assigned by the system that identifies the lookup value. This ID is used when merging lookup values.

'Sort By #' Button Renamed

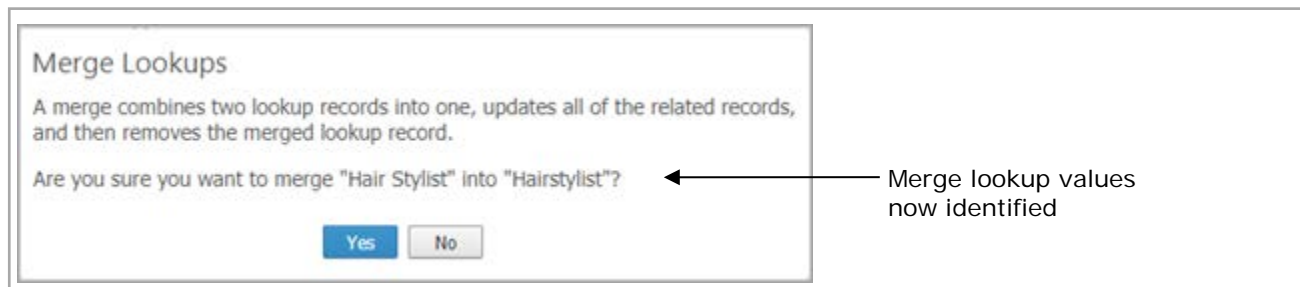
Users reported confusion about the function of the **Sort By #** button in the **Lookup Management** toolbar. To clarify the button's function, we changed the name to **Sort by ID**.

Click the **Sort by ID** button to sort the grid in ascending order by values in the **Lookup ID** column.



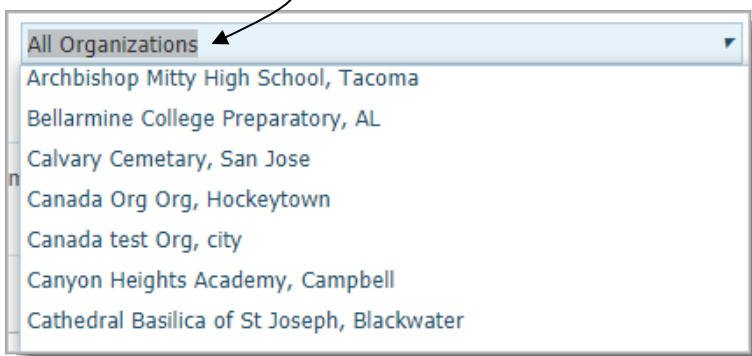
Pop-Up Message for Confirming Lookup Merges Revised

Previously after users submitted a request to merge lookup values, the system displayed a generic message prompting them to confirm the merge. We revised this message to now include the names of the actual values so that users can quickly verify that they selected the right ones to be merged.



'All Organizations' Option Added to the Organization Dropdown List

We added the **All Organizations** option to the Organization dropdown list on the **Lookup Management** page.



This option is visible only to users who meet these requirements:

- Have the **Diocesan Admin** access right enabled in their staff record
- Have an active assignment to the diocese
- Have access to multiple organizations

When the user selects the **All Organizations** option, the lookup values belonging to all organizations the user has an active assignment to are displayed in the grid for the selected table.

Manage Staff

Add New Staff Process Improved

Some users reported experiencing confusion with the Add New Staff process, stating that it sometimes led them to mistakenly create duplicate member records. We redesigned the process so that it is now much more intuitive and straightforward. Users will now find certain action buttons disabled or not visible until specific criteria are met. The redesign significantly reduces the chance of creating duplicate records. If you need instructions for adding new staff, go to this topic in the Administration online Help: *How to Add a New Staff Member*.

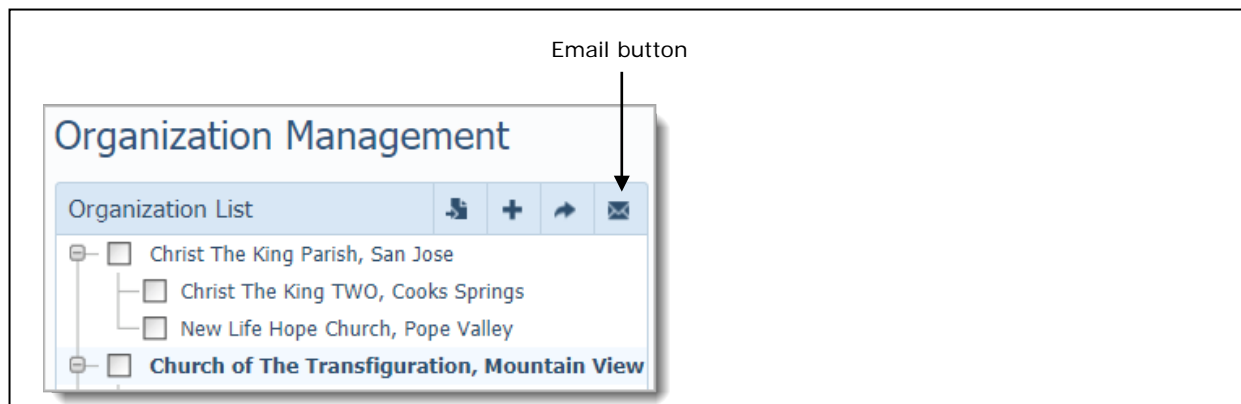
Organizations

Added Ability Send Email to Organizations

Diocesan administrators can now send email messages to heads of organizations using the new email functionality added to the **Organization Management** page. As shown below, an Email button for this purpose was added the toolbar in the **Organization List** panel:

Note

To send an email message, you need a Web-based email client or program, such as Gmail or Hotmail, or Microsoft Outlook.




For step-by-step instructions on sending email messages, open the How to Send an Email to an Organization topic in the ParishSOFT Family Suite Administration Help.

Mail Merge Utility Added

Mail Merge functionality was added to the **Organization Management** page, enabling diocesan staff to create mail merge letters and documents in support of various diocesan-wide fundraising campaigns and communication activities. A Mail Merge button for this purpose was added to the toolbar in the **Organization List** panel:



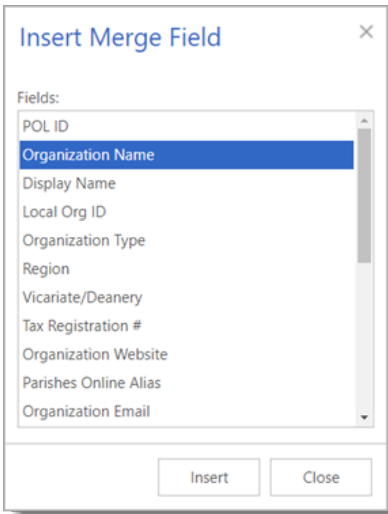
To use Mail Merge:

1. Do one of the following:
 - If you want to create mail merge documents for specific organizations, select them from the Organization List.
 - If you want to include all organizations in your Mail Merge output, leave all the checkboxes blank.
2. Click  (Mail Merge).
3. From the displayed menu, select one of these options:
 - **Merge Selected Records:** merges records from the organizations you selected in Step 1. (The number of organizations you select appears in parentheses.)
 - **Merge All Records:** merges records from all organizations in the Organization List.

The system loads the records into Mail Merge.

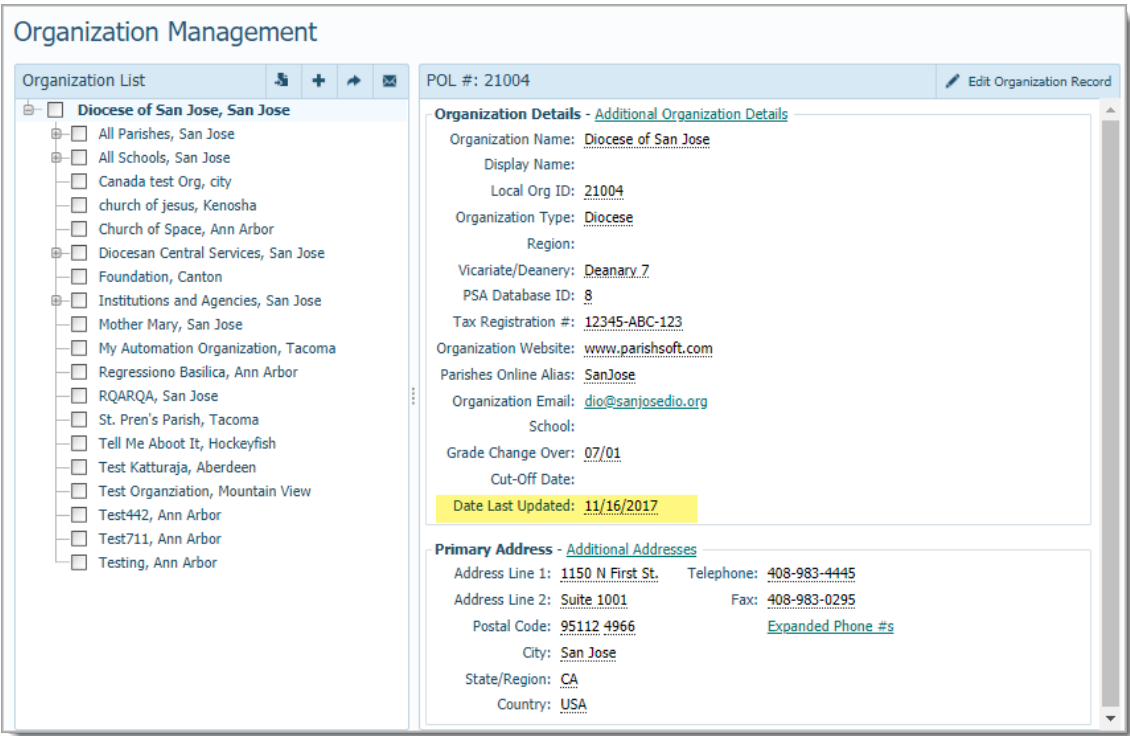
You can now create a mail merge document for the organizations you selected.

As shown in the following illustration, the **Insert Merge Field** menu contains organization-based fields that you can insert into Mail Merge templates. The actual data in these fields appears in the final document.



‘Date Last Updated’ Field Added

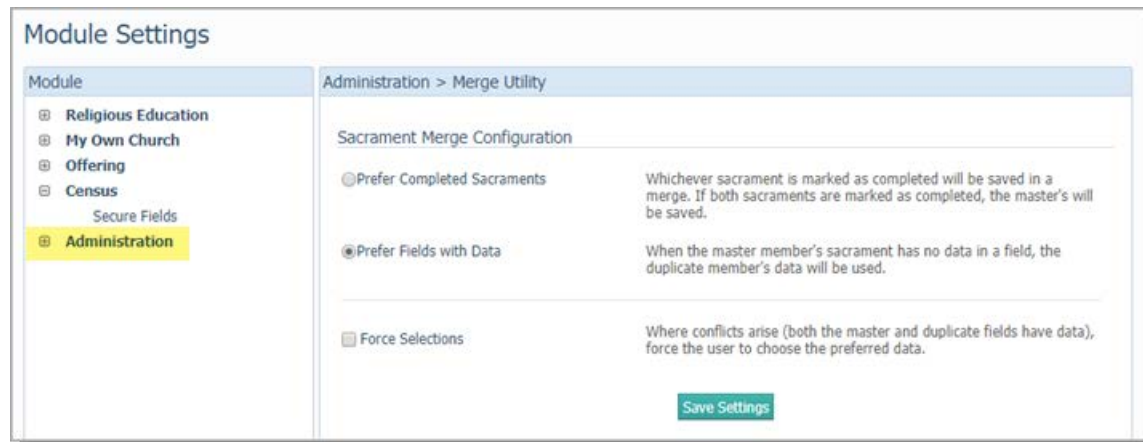
As shown in the following illustration, we added the **Date Last Updated** field to **Organization Details**. This field shows the date that information for the selected organization was last modified.



Module Settings

Configuration Options Added to Control How Sacrament Data Is Handled During Merge Families Process

As shown in the following illustration a new section, named **Administration**, was added to the **Module Settings** page. This section provides options diocesan administrators can use to control how the system handles sacrament data during the Merge Families process.



The screenshot displays the 'Module Settings' interface. On the left, a sidebar lists modules: Religious Education, My Own Church, Offering, Census, Secure Fields, and Administration (highlighted in yellow). The main content area is titled 'Administration > Merge Utility'. Below this, the 'Sacrament Merge Configuration' section contains three options: 'Prefer Completed Sacraments' (radio button), 'Prefer Fields with Data' (radio button, selected), and 'Force Selections' (checkbox). Each option has a descriptive text explaining its function. A 'Save Settings' button is located at the bottom right of the configuration area.

Option	Description
<input type="radio"/> Prefer Completed Sacraments	Whichever sacrament is marked as completed will be saved in a merge. If both sacraments are marked as completed, the master's will be saved.
<input checked="" type="radio"/> Prefer Fields with Data	When the master member's sacrament has no data in a field, the duplicate member's data will be used.
<input type="checkbox"/> Force Selections	Where conflicts arise (both the master and duplicate fields have data), force the user to choose the preferred data.

Three options for handling sacrament data are provided:

- **Prefer Completed Sacraments:** when merging data for corresponding sacraments, keep the data for whichever sacrament is marked as "Completed." If the sacrament in both records is marked "Completed," keep the data in master record.
- **Prefer Fields with Data:** if sacrament data exists in the duplicate record but not in the master record, copy the data from the duplicate record into the empty fields in the master record.
- **Force Selections:** if both the duplicate and master record have sacrament data in corresponding fields, prompt the user to review and resolve the conflict.

Feature Added to Enable Users to Resolve Sacrament Merge Conflicts

During the process of merging sacrament data, the system will sometimes encounter data in the same field in the master and duplicate records that disagrees. In such instances, the system stops the merge and displays a message to notify you about the issue. For example:

Note

*The message you see may be different from the one shown below. Your diocese determines how it wants merges of sacrament data to be handled. If the diocese wants you to review and resolve conflicts, the **Skip** button is not shown.*

Sacrament Conflicts

The following members have conflicting sacramental records. Click Review to review the details of each conflict, or skip to have the records merged automatically.

Master Member	Duplicate Member
Michelle Adams (257543)	Karli Adams-Snyder (257544)

Depending upon which buttons are available, choose one of the following actions:

- If you want to decide what the final data should be, click to take a look at the data.

A review page similar to the one below is displayed. For the sacrament record under consideration, the page highlights the data fields containing the conflicts in master and duplicate sacrament records. In the following illustration, seven fields contain conflicting data:

Sacrament Merge

Review the following two sacramental records to create a final version. Instances where data exists in both the master and duplicate record have been highlighted.

Master Member	Duplicate Member	
Isabel Brundage (628910)	Isabel Brundage (628911)	Review

Baptism Conflicts

Data Fields	Master Sacrament	Duplicate Sacrament	Final Sacrament
Date Completed:	5/1/2018	6/4/2018	5/1/2018
Parish:	Our Lady of Refuge, San Jose	Cathedral Basilica of SS Peter & Paul, Philadelphia	Our Lady of Refuge, San Jose
Celebrant:	Abair, AE3 Frederick	Most Reverend Carl Alter	Abair, AE3 Frederick
Prep Year:	2010	2018	2010
Title:	Mr.	Miss	Mr.
First Name:	Paul	Paula	Paul
Last Name:	Frederick	Fredrick	Frederick

To resolve the conflicts:

- For each data field, review the values displayed in the **Master Sacrament** and **Duplicate Sacrament** columns. Then, select the data value you want to retain.

The system shows the values you selected in the **Final Sacrament** column.

- Click to save the values.

The system merges the records, keeping the data values shown in the **Final Sacrament** column.

OR

- If you want to accept the method specified by your diocese to resolve the sacrament merge conflicts, click .

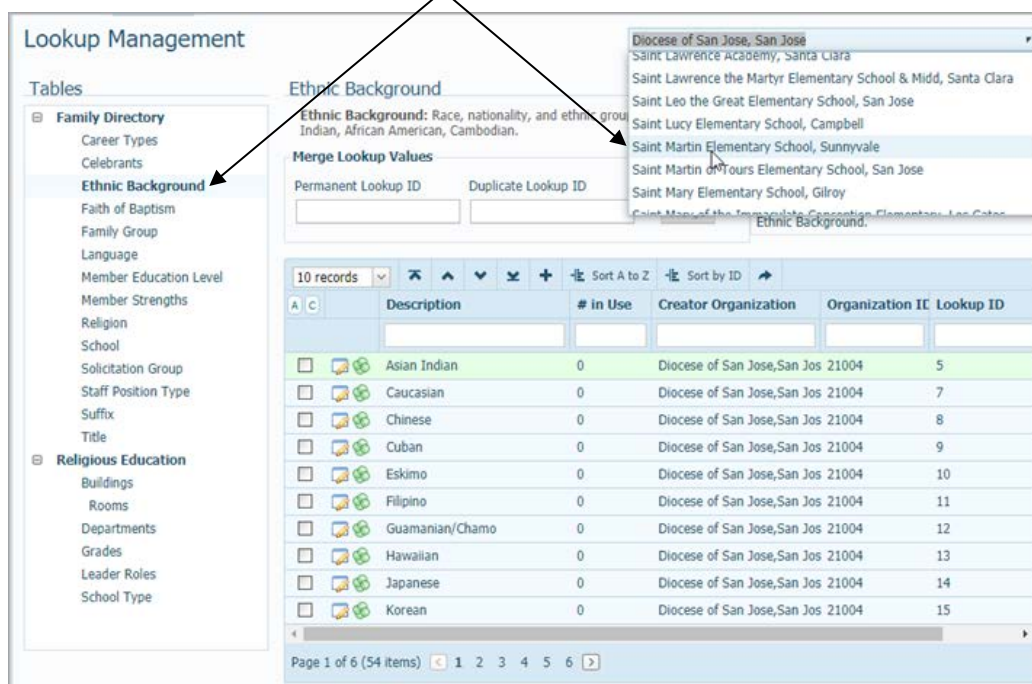
Resolved Issues

Lookups

System Retains the User's Previously Selected Lookup Table After an Organization Change

Previously on the **Lookup Management** page, whenever the user changed organizations the system did not retain the lookup table selected before the change. The system always switched to show values for the first table listed in the **Tables** panel. We fixed this issue. Now the system keeps the focus on the lookup table the user last selected and shows that table's values after the user changes organizations.

If you select a lookup table in the **Tables** panel and then change organizations, the system now shows values in the table you selected before you made the change.



Edits to Descriptions of Member Strengths Lookup Values Now Saved

Previously, the system did not save the user's edits to the description of a Member Strength value. We fixed this issue. Edits are now saved, and in Family Directory **Member Details** is updated accordingly with the revised description.

Merge Families

System Now Successfully Merges Records of Families Making Anonymous Gifts

Previously, a merge did not complete if one or both families being merged was associated with anonymous gifts through the integration with the Online Giving application. With this update, records of families associated with anonymous gifts through Online Giving can now be merged successfully.

Unrecognized Family ID Value in Duplicate Family Record No Longer Causes Merge Error

Previously, a merge error occurred if the Family DUID value was set to zero (0) in either the duplicate or master record. This issue was resolved, so that such merges now complete successfully.

'DELETE statement' and 'REFERENCE constraint' Conflict Error Resolved

Previously when the user tried to merge member records or family records, the system sometimes, generated this error:

```
The DELETE statement conflicted with the REFERENCE constraint
```

Each of the error conditions causing this error were resolved.

Unexpected Religious Education Data No Longer Causes Merge Error

Previously, the merge process generated an error when it encountered an unrecognized Religious Education data value in one of the records it was attempting to merge. This data value was inserted after a Religious Education Admin Reset was performed on the organization's Religious Education data. We modified the merge process to correctly handle merges when it encounters the data value in a family's record.

System Now Successfully Merges Family Records with Missing Values in Required Fields

Previously, some merges of family records could not be completed because one of the records being merged was missing a value in a required field. We resolved this issue to enable merges of this type to complete successfully.

System Now Retains All of the Duplicate Family's Organizational Associations After a Merge

Previously when two family records were merged, if the duplicate family had multiple organizational associations, only associations in common with the master family were retained. Any associations unique to the duplicate family were dropped. We fixed this issue. After a merge, the duplicate family retains the same organizational associations it had prior to the merge.

Merge Process Can Now Handle Long Organization Names

We resolved an issue that caused the merge process to generate an error if an organization's name was too long. We expanded the limit on the length of the organization name field to prevent this error.

Non-Matching Anointing of the Sick Sacrament Records No Longer Cause Merge Errors

Previously, if the duplicate member's anointing of the sick sacrament record contained one or more sacrament records and the master record contained none, the system generated this error:

The DELETE statement conflicted with the REFERENCE constraint

We fixed this issue. The system is not able to successfully complete the merge and transfer the duplicate member's anointing of the sacrament records to the master record.

Unexpected Data Value Associated with Contribution Statements No Longer Causes Merge Error

Previously, the merge process generated an error when it encountered an unrecognized data value associated with contribution statements in one or both records it was trying to merge. We fixed this issue.

Anointing of the Sick Sacrament Records with the Same Date No Longer Cause Merge Error

Previously, the merge process generated an error when it encountered the same anointing of the sick sacrament record with the same completion date in both records. We fixed this issue. The system now successfully completes the merge and adds the records to the master family.

Subsequent Updates to the 4.4.4 Release

We strive to ensure a problem-free version update. Nevertheless, some issues occasionally arise after a major release. We fix such issues quickly in subsequent updates to the software. The following table lists the issues that were encountered in the v4.4.4 release that were quickly resolved in a subsequent update.

Table 3. Issues Resolved in the v4.4.4.61 Update


Module	Issue Description	Update
Family Suite	<p>Address data not visible in desktop applications after changes are synced from ParishSOFT Family Suite</p> <p>When address changes made in ParishSOFT Family Suite are synced down to the desktop, data in these fields is not visible: City, State/Region, and Postal Code.</p> <p> IMPORTANT</p> <p>This issue only impacts address data in organizations syncing changes from the Web application to the desktop. Note that address data is not lost. It is present but cannot not be seen.</p>	<p>This issue was resolved.</p> <p>After the user updates an address field in a family's record in ParishSOFT Family Suite, data in the City, State/Region, and Postal Code fields in these desktop applications is now visible: Aim Family Directory, Parish IQ, and desktop Family Directory.</p>

Table 4. Issues Resolved in the v4.4.4.62 Update

Module	Issue Description	Update
Religious Education	<p>Oops error experienced when some users try to display Classes page</p> <p>Some users are experiencing an Oops Arithmetic Overflow error when trying to display the Classes page.</p>	<p>This issue was resolved.</p> <p>Users no longer experience an error when displaying the Classes page.</p>

Table 5. Issues Resolved in the v4.4.4.63 Update

Module	Issue Description	Update
Family Suite	<p>System not clearing the first selected family's giving history</p> <p>After a user views a family's giving history and then clicks Edit Details in subsequently opened family records, the system displays the first family's giving history information instead of displaying the selected family's giving history.</p>	<p>This issue was resolved.</p> <p>After the user exits the first family's record, opens a new record, and then clicks Edit Details, the system shows the selected family's giving history.</p>
Religious Education	<p>Timeout error sometimes occurs when users try to display the Student Directory and Classes pages</p>	<p>This issue was resolved.</p>
Administration	<p>Lookup Permissions window, (accessed by clicking the Bulk Permissions Manager link), not scrolling when zoom level of the browser is set so large that the window does not fit on the page</p>	<p>This issue was resolved.</p> <p>A scroll bar was added to enable scrolling of the Lookup Permissions window when the browser is set to higher zoom-level settings.</p>

Table 6. Issues Resolved in the v4.4.4.64 Update

Module	Issue Description	Update
Diocesan Development	<p>Non-registered families making an OBO contribution to a parish not included in the Parish Master report</p> <p>The Parish Master report does not show the names of non-registered families who made an on-behalf of (OBO) pledge to a parish. The report should include these families.</p>	<p>Non-registered families making OBO pledges and contributions to a parish are now included in the Parish Master report.</p>
	<p>Non-Givers list in the Parish Master report incorrectly includes non-registered families that have not given to a parish</p> <p>This issue causes the count shown for the list of non-givers to be incorrectly calculated because the list includes non-givers that are not registered to a parish.</p>	<p>The Non-givers list in the Parish Master report now only includes the names of registered families that have not given to a parish. This enables a parish to see which registered families have made no contributions.</p>
	<p>Donor List report sometimes contains duplicate names</p> <p>Registered families making an on-behalf-of (OBO) contribution to another parish appear twice in the Donor List report for their single contribution if both the registered parish and OBO parish are selected in the Organization list.</p>	<p>We found and fixed the cause of the duplication.</p>

Table 7. Issues Resolved in the 4.4.67 Update

Module	Issue Description	Update
Administration	<p>Merge lookup process not updating Family Directory fields with merged lookup values when All Organizations is selected</p> <p>When All Organizations is selected, the merge process correctly merges selected records. However, associated fields in Family Directory continue to use old lookup values instead of the merged ones. This issue affects merged lookup values in these Family Directory tables:</p> <ul style="list-style-type: none">▪ Ethnic Background▪ Language▪ Member Education Level▪ Religion▪ School▪ Suffix▪ Title▪ Family Group▪ Solicitation Group▪ Career Type	<p>This issue was resolved.</p> <p>When All Organizations is selected, the merge process now updates fields in Family Directory where the lookup value is used.</p>

Contacting ParishSOFT

If you have questions or require support while using the application, use any of the following methods to contact us:

	http://www.parishsoft.com/getsupport
	support@parishsoft.com
	(734) 205-1000 (main) (866) 930-4774 (support) (734) 205-1011 (fax)