



VERSION 4.4.8 RELEASE NOTES

These release notes keep you informed about the latest features and changes available in Release v4.4.8 of ParishSOFT Family Suite and ParishSOFT Diocesan Suite.

Contents

- ParishSOFT Family Suite 2
 - GDPR Compliance Updates 2
 - Family Directory 5
 - Updates and Enhancements 5
 - Resolved Issues 11
 - Religious Education 12
 - Updates and Enhancements 12
 - Offering 13
 - Resolved Issues 13
 - IQ 15
 - Resolved Issues 15
- ParishSOFT Diocesan Suite 16
 - Census 16
 - Resolved Issues 16
 - Diocesan Development 17
 - Resolved Issues 17
 - Administration 18
 - Updates and Enhancements 18
 - Resolved Issues 19
- Contacting ParishSOFT 20

ParishSOFT Family Suite

GDPR Compliance Updates

On May 25, 2018 the European Union's General Data Protection Regulation (GDPR) went into full effect. GDPR is a European regulation that addresses data protection and privacy for individuals located in and outside of the European Union. The major focus of this legislation is to give individuals control over their personal data collected and stored by companies. The notes in this section describe functionality added to ParishSOFT Family Suite to help make it easier for you to comply with GDPR legislation.

Cookie Consent Notice Added

Cookies are small files stored on your device by your browser that allow it to recognize your device and store information specific to your experience using a website. ParishSOFT Family Suite uses cookies in a variety of ways. For example, they are used to store the username of the user who last logged into ParishSOFT Family Suite on your computer. They are also used to auto-fill field values so that previously entered values do not need to be re-entered the next time you return to a form. In short, we use cookies to provide you with a customized experience with applications in ParishSOFT Family Suite.

Because the use of cookies raises data privacy and security concerns, the "Cookie Law" (a piece of GDPR legislation) was recently enforced. This law requires websites to both inform visitors that the site uses cookies and to obtain each user's consent before placing cookies on their devices. With this update, ParishSOFT Family Suite is cookie law compliant. Prior to logging in, you will see this pop-up message informing you that cookies are used and asking for your permission to place them on your device:



Do one of the following:

Note

To log in to ParishSOFT Family Suite, you must click .

- Click to log in to ParishSOFT Family Suite and to allow us to place cookies on your device.
- Click to read the complete cookie and privacy policy statement.

Terms of Use Agreement Updated for GDPR Compliance

To comply with GDPR legislation, we updated our website's Terms of Use agreement. This agreement outlines your rights and responsibilities and the terms and conditions under which you can access and use the applications on our site. When logging in for the first time to the v4.4.8 release of ParishSOFT Family Suite, you will be prompted to read and consent to the Terms of Use agreement. Please read the agreement carefully. If you click the **Agree** button to accept the terms and conditions, you are legally bound by them and can proceed to access and use the site. If you click the **I Do Not Agree** button, your access to the site is prohibited.

We recommend that you periodically review the Terms of Use agreement. You can read the current agreement by clicking this [Terms of Use](#) link on the ParishSOFT Family Suite Login page:



'Right to Be Forgotten' Feature Added

GDPR includes a "Right to be Forgotten" directive, which gives individuals the right to request that their personal data be erased or removed from accessibility. To make it easy for organizations to process removal requests, we added these toolbar buttons:

- **Forget Selected Family**: on the **Family List** page, this button lets you remove a selected family's personal data. For instructions, see "[Forget Selected Family Button Added](#)."
- **Forget Selected Member**: on the **Member List** page, this button lets you remove a selected member's personal data. For instructions on removing a member's data, see "[Forget Selected Member Button Added](#)."

To verify that a family or member's personal data was removed, you can run a GDPR report. For details, see "[Forgotten Family and Forgotten Member Reports Now Available](#)."

Note

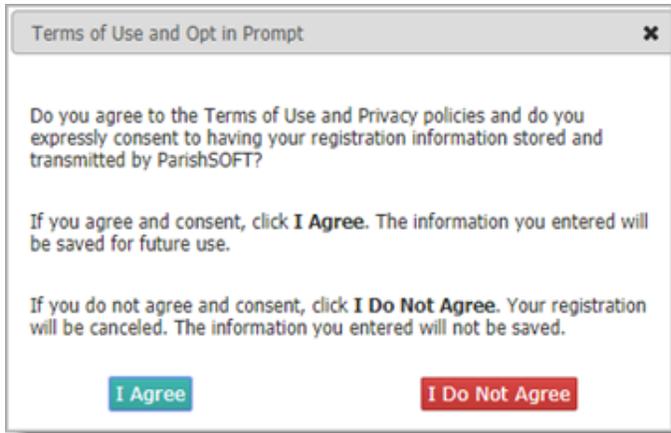
Do you have questions about the Forget Feature? We've compiled a list of the most frequently asked questions about this new feature. To read the responses, see this topic in the ParishSOFT Family Directory Online Help: "Frequently Asked Questions About ParishSOFT's Forget Feature."

Prompt Added to Terms of Use for New Users

GDPR legislation requires websites to disclose any data collection and give users the ability to consent to having their personal data collected. To comply with the legislation, our Terms of Use and Privacy agreements now provide an opt-in prompt (see illustration below) to allow new users to consent to having ParishSOFT transmit and store the personal information in their profile.

Note

The Terms of Use and Privacy contracts referred to in the Opt In prompt message below are accessed respectively from links at the bottom of the New User Registration form.



Family Directory

Updates and Enhancements

Family List

'Forget Selected Family' Button Added

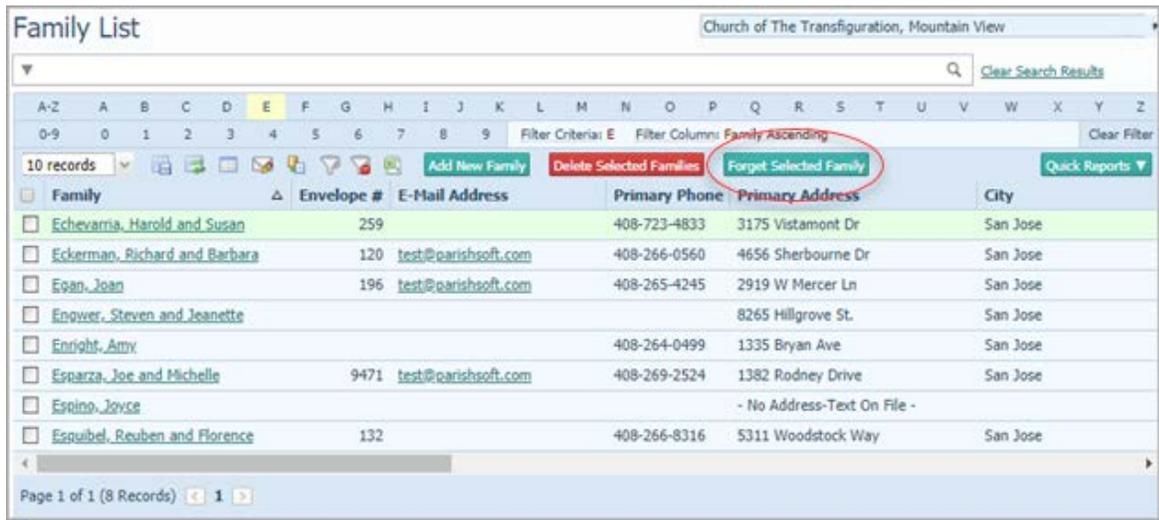
To make it easier for organizations to comply with a family's request to have their personal data removed, we added the **Forget Selected Family** button to the **Family List** page (see illustration below). This button removes personally identifying information from a family's record.

Note to Parishes

*The availability of the Forget Selected Family feature is determined by your diocese. If you do not see the **Forget Selected Family** button on the **Family List** page, your diocese has decided not to make the feature available to all parishes. If you have questions about using this feature, contact your diocesan administrator.*

Note to Dioceses

If you want to discuss configuration of the Forget Family feature, contact the ParishSOFT Support team.



To forget a family, complete the following:

Notes

You must have Family Directory View + Add/Edit permissions to remove data from a family's record.

1. Click . Then, in the **Family List** grid, select the desired family.



WARNING

You are about to permanently remove the selected family's personally identifying information from your database. Verify that you selected the right family. After you click the Forget Selected Family button, the family's personal information will be gone and cannot be retrieved.

2. Click .
3. When prompted to confirm the "forget family" request, click .

The system removes or masks all information that personally identifies the family (for example, name, address, and phone number). In the family's record, the request to be "forgotten" is recorded on the **Notes** tab in the **Logfile** section. In **Member Details**, the identity of each family member is anonymized (changed to "GDPR"), and in the grid on the **Family List** page, the family's name is changed to "GDPR, GDPR."

Notes

*To keep data structures intact so that reporting, for example, is not affected, the Forget Family process does not remove data from required (asterisked *) fields. Data in required fields is anonymized (replaced with "GDPR"). To see specific changes made to a forgotten family's record, refer to the report illustrations at Step 4 in this release notes entry: "[Forgotten Family and Forgotten Member Reports Available](#)" or to this topic in the ParishSOFT Family Suite Online Help: "How to Create a GDPR Forgotten Families Report."*

To maintain data integrity, the Forget Family process does not modify sacrament records. These records continue to show the name of the individual receiving the sacrament. Religious Education and Offering records also remain intact to enable you to maintain accurate student counts and financial data, respectively. However, all personally identifiable information, such as student and donor names and addresses, is permanently removed from Religious Education and Offering records to protect the forgotten family's identity.

If desired, you can run a report to verify that the family's personal data was removed. For details, see this entry: "[Forgotten Family and Forgotten Member Reports Available](#)."

Note

Do you have questions about the Forget Feature? We've compiled a list of the most frequently asked questions about this new feature. To read the responses, see this topic in the ParishSOFT Family Directory Online Help: "Frequently Asked Questions About ParishSOFT's Forget Feature."

Member List

'Forget Selected Member' Button Added

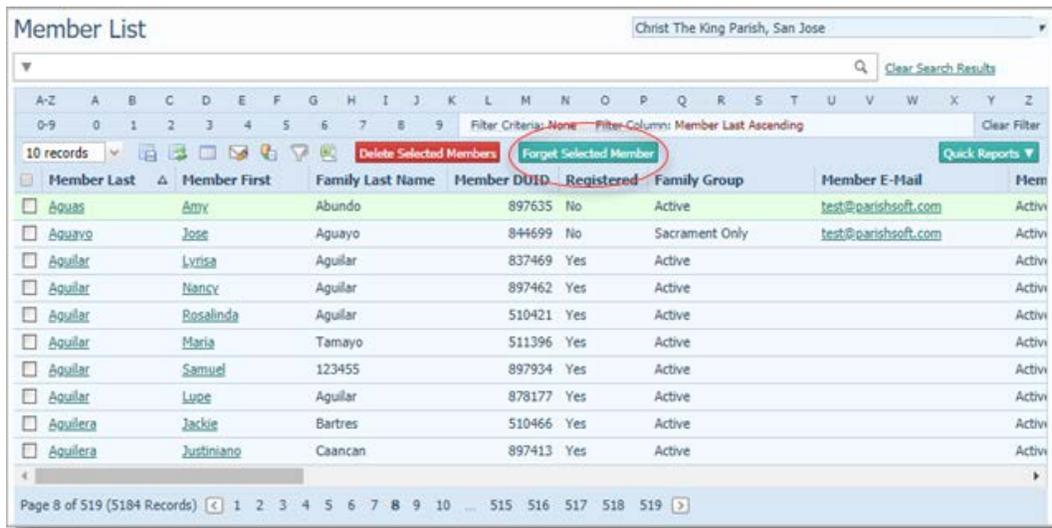
To make it easier for organizations to comply with a member's request to have their personal data removed, we added the **Forget Selected Member** button to the **Member List** page (see illustration below). This button removes personally identifying information from a member's record.

Note to Parishes

*The availability of the Forget Selected Member feature is determined by your diocese. If you do not see the **Forget Selected Member** button on the **Member List** page, your diocese has decided not to make the feature available to all parishes. If you have questions about using this feature, contact your diocesan administrator.*

Note to Dioceses

If you want to discuss configuration of the Forget Member feature, contact the ParishSOFT Support team.



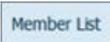
The screenshot shows the 'Member List' interface for 'Christ The King Parish, San Jose'. It features a search bar, a filter dropdown set to 'None', and a 'Clear Search Results' button. Below the search area is a table with columns: Member Last, Member First, Family Last Name, Member DUID, Registered, Family Group, and Member E-Mail. The first row is highlighted in green. A red circle highlights the 'Forget Selected Member' button in the toolbar above the table. Other buttons include 'Delete Selected Members' and 'Quick Reports'. The bottom of the screen shows 'Page 8 of 519 (5184 Records)' and a pagination control.

Member Last	Member First	Family Last Name	Member DUID	Registered	Family Group	Member E-Mail	Mem
Aguas	Amy	Abundo	897635	No	Active	test@parishsoft.com	Activ
Aguayo	Jose	Aguayo	844699	No	Sacrament Only	test@parishsoft.com	Activ
Aguilar	Lynsa	Aguilar	837469	Yes	Active		Activ
Aguilar	Nancy	Aguilar	897462	Yes	Active		Activ
Aguilar	Rosalinda	Aguilar	510421	Yes	Active		Activ
Aguilar	Maria	Tamayo	511396	Yes	Active		Activ
Aguilar	Samuel	123455	897934	Yes	Active		Activ
Aguilar	Lupe	Aguilar	878177	Yes	Active		Activ
Aguilera	Jackie	Bartres	510466	Yes	Active		Activ
Aguilera	Justiniano	Caancan	897413	Yes	Active		Activ

To forget a member, complete the following:

Notes

You must have Family Directory View + Add/Edit permissions to perform this task.

1. Click . Then, in the **Member List** grid, select the desired member.



WARNING

You are about to permanently remove the selected member's personally identifying information from your database. Verify that you selected the right member. After you click the Forget Selected Member button, the member's personal information will be gone and cannot be retrieved.

2. Click **Forget Selected Member**.
3. When prompted to confirm the “forget member” request, click **OK**.

The system removes or masks all information that personally identifies the member (for example, name, address, and phone number). In the member’s record, the request to be “forgotten” is recorded on the **General** tab in the **Member Notes** section.

Note

*To keep data structures intact so that reporting, for example, is not affected, the Forget Member process does not remove data from required (asterisked *) fields. Data in required fields is anonymized (replaced with “GDPR”). To see specific changes made to a forgotten member’s record, refer to the report illustrations at Step 4 in this release notes entry: [“Forgotten Family and Forgotten Member Reports Now Available”](#) or this topic in the ParishSOFT Family Suite Online Help “How to Create a GDPR Forgotten Members Report.”*

To maintain data integrity, the Forget Member process does not modify sacrament records. These records continue to show the name of the individual receiving the sacrament. Religious Education and Offering records also remain intact to enable you to maintain accurate student counts and financial data, respectively. However, all personally identifiable information, such as student and donor names and addresses, is permanently removed from Religious Education and Offering records to protect the forgotten member’s identity.

If desired, you can run a report to verify that the member’s personal data was removed. For details, see [“Forgotten Family and Forgotten Member Reports Available.”](#)

Note

Do you have questions about the Forget Feature? We’ve compiled a list of the most frequently asked questions about this new feature. To read the responses, see this topic in the ParishSOFT Family Directory Online Help: “Frequently Asked Questions About ParishSOFT’s Forget Feature.”

Reports

Forgotten Families and Forgotten Members Reports Available

To see what data is removed when you forget a family's or member's record, you can run a Forgotten Families or Forgotten Members report, respectively. You can also run this report after forgetting a family or member to confirm that personally identifying information was removed from their record. Here's how to run both reports:

Note

You must have Family Directory View + Add/Edit + Print permissions to run this report.

1. Click .
2. In the **Report Type** menu, select **GDPR**. Then, in the Report menu select **Forgotten Families** or **Forgotten Members**.
3. The **Date Range** section lets you specify a time period to search for removed records. Do one of the following:
 - To find records removed during a specific period, select a start date and an end date.
 - To find all removed records, deselect the **Start Date** and **End Date** checkboxes.
4. Click .

The following illustration shows an example of a forgotten family's record. Required (asterisked *) field data in the record (for example, **Last Name**) is replaced with "GDPR" to anonymize it. Other fields containing personally identifiable information either contain no data or show the field's default value (for example, **False**). The record is also tagged with the date (not shown in the illustration below) when the family's request to be forgotten was processed.

Forgotten Families		1
Family Information:		
Family DUID:	461973	Annual Gift:
F LastName:	GDPR	Map Code:
F. Mailing:		PostalCode:
Infor. Name:		Address 1:
F. Salutation:		Address 2:
Fam. Email:		City:
P. Phone:		Phone:
Eme. Phone:		Send Mail: False
Fam Envelope:		Send Env.:
Diocesan ID:		Publish Phone: False
		Publish Email: False
		MLNA: False
		P. Address: False
		Publish Photo: False
		General Notes
		Pst. Notes:
		Health Notes:
		Dio Notes:

This next illustration shows an example of a forgotten member's record. Required (asterisked *) field data in the record (for example, **First Name** and **Last Name**) is anonymized (replaced with "GDPR"). Other fields containing personally identifiable information either contain no data or show the field's default value (for example, **True**).

Forgotten Members		
Title:	Aux ID:	Address 1:
Nick Name:	Vendor ID:	Address 2:
Middle Name:	Notes:	Address 3:
Special Needs:	Member Forgotten per their request	
Suffix:	Email Address: gdpr@parishsoft.com	S Phone:
Maiden Name:	Home Phone:	S Fax:
	Cell Phone:	S Email:
Birth Date:	Work Phone:	S Phone Num:
Birth Place:	Pager:	S Phone Ext:
Age:	Fax:	S Phone Type:
Date of Death:	Student Notes:	
Religion:	Gender U	
Language:	First Name GDPR	
Ethnicity:	Last Name GDPR	
Marital Status: 100	Status True	
Father Name:	Envelope: 0	
Mother Name:	SSN:	
M.M.Name:	Strength 1:	
Sac. Remarks:	Strength 2:	
Career Type:	Strength 3:	
Details:	Strength 4:	
Schools:	Strength 5:	
Education:	P Address: False	
Grad Year:	P Phone: False	
Username: GDPR9181	Zip:	

Resolved Issues

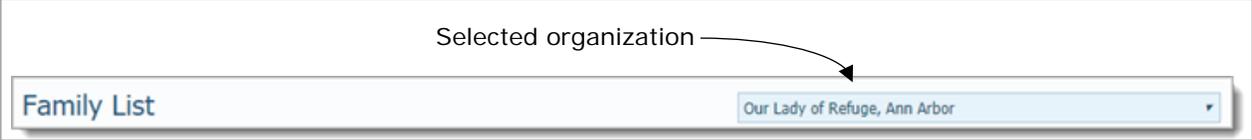
Family List

Family Records of Staff with Active Assignments in Other Organizations Can Now Be Deleted

Previously users experienced the following error when trying to delete family records of staff holding active assignments in organizations different from the selected one:

Records cannot be deleted when a member has an active staff assignment

We modified the functionality so that users no longer experience this error when trying to delete family records of staff with active assignments in other organizations. However, users will encounter this error when trying to delete family records of staff with active assignments in the selected organization.



'Add New Family' Search Now Shows Member Records for All Families

Previously, when parish staff added a new family record, they could only see the names of members in families currently associated with the selected organization. Not being able to see the names of members in families not associated with the selected organizations sometimes made it difficult for staff to verify whether they had the right family record. The search process now shows member records for all families even for those families that are not associated with the selected organization.

Religious Education

Updates and Enhancements

Classes

Performance Improvements Made to the Add Students Process

Previously, the Add Students process was slow to load people records, which made the process of adding students to classes sluggish. We streamlined the process so that people records matching the user's search criteria are loaded only after the user clicks the **Search** button. With this change, the process of adding new students now runs much faster.

Performance Improvements Made to the Add Leaders Process

Previously, the Add Leaders process was slow to load people records, which made the process of adding leaders to classes sluggish. We streamlined the process so that people records matching the user's search criteria are loaded only after the user clicks the **Search** button. With this change, the process of adding new leaders now runs much faster.

Offering

Resolved Issues

ParishSOFT Giving Integration

Imported Contributions No Longer Posted to Family DUID of Merged-Out Records

Previously, contributions imported from ParishSOFT Giving that were associated with merged-out family records were incorrectly posted to family DUIDs removed during the Merge Family process. We resolved this issue. Imported contributions are posted to the correct master record resulting from a merge.

Payment Type Information No Longer Missing from Imported Contributions

Previously, some contributions imported from ParishSOFT Giving showed a zero (0) in the **Payment Type** field in the Offering contribution record instead of the actual payment method used. We found and fixed the cause of this issue. The actual payment method (for example, Cash, Credit, or Matching Gift) used to collect the donation in ParishSOFT Giving now appears in the Offering contribution record.

Member Contributions from ParishSOFT Giving Now Show in Contribution Statements

Previously in the Contribution Statements report setup when the **Contribution Source** was set to **Include Member Contributions in Family Statements**, member contributions imported from ParishSOFT Giving were not included. We resolved this issue. If the user specifies that member contributions should be included, such contributions made through ParishSOFT Giving are now listed on contribution statements.

'Invalid Token Error' Resolved

Previously, the system experienced the following error when attempting to import contributions from ParishSOFT Giving into the Offering module in ParishSOFT Family Suite:

```
Invalid Token Error
```

We found and fixed the cause of this error, and the contributions that were affected were successfully imported into ParishSOFT Offering.

'Object Reference not set to an instance of an object' Error Resolved

Previously, the system experienced the following error when attempting to import contributions from ParishSOFT Giving into the Offering module in ParishSOFT Family Suite:

```
Object Reference no set to an instance of an object
```

We found and fixed the cause of this error, and the contributions that were affected were successfully imported into ParishSOFT Offering.

Imported Contributions No Longer Posted to Merged-Out Member DUIDs

Previously, contributions imported from ParishSOFT Giving that were associated with merged-out member records were incorrectly posted to member DUIDs that had been removed during the Merge Family process. We resolved this issue. The system now locates the master record and correctly posts imported contributions to the member DUID resulting from the most recent successfully completed merge.

Batches

Bad Credentials Error Experienced When Trying to Close Accounting Batches Resolved

Previously, staff with Close Batch permissions at multiple organizations that use the ParishSOFT Accounting to Offering Integration sometimes experienced the following error when attempting to close a batch containing accounting transactions:

```
Bad Credentials
```

We found and fixed the cause of this error.

Reports

Ops Timeout Error Experienced When Attempting to Run an Audit Report Resolved

Previously, users occasionally experienced an Ops timeout error when trying to run an Audit report. We fixed this error.

Envelope Number for Non-Givers Now Displays in Summary Contribution Statements

Previously for members only, if the **Show non-givers** option was selected in the setup for the Contribution Statements report, the envelope number was missing from the **Env#** field in the header of the generated statements. We fixed this issue. If the member's envelope number exists in the database of the organization running the report, the number now shows in the field. Otherwise, the field is blank.

IQ

Resolved Issues

Pledge Designations Data No Longer Missing from Query Results Set

We resolved an issue that occasionally caused pledge designation data to be missing from the results set of queries that pulled data from multiple funds.

Queries Created and Saved in ParishSOFT IQ Now Run Successfully in AIM IQ

Previously, ParishSOFT IQ queries that pulled data from the **Contributions > Payment Date** column generated an error when run in the desktop AIM IQ application. We implemented a fix to prevent this problem from occurring. As of this release, queries created in ParishSOFT IQ that pull data from the **Contributions > Payment Date** column now run successfully in AIM IQ.

To fix the problem in an existing query that uses the **Contributions > Payment Date** column, do the following:

1. Open the query in ParishSOFT IQ.
2. Remove the **Contributions > Payment Date** column from the query.
3. Add the **Contributions > Payment Date** column back to the query.
4. Save the query.

You can now run the query in AIM IQ without experiencing an error.

Data in Query Results Set Now Displayed in Human-Readable Text

Previously, queries that pulled data from the **Comments** column for member's life events displayed comments in code instead of natural language. We fixed this issue. The comments are now presented in human-readable text.

Results Returned by Queries Pulling Family or Member Data Now Limited by the Organization

Queries pulling family or member data now return results based on information the organization running the query has in its records for the family or member. Previously, such queries returned results based on the information the organization of registration had on record for the family or member. As a result, information sometimes appeared incorrect to the organization running the query.

ParishSOFT Diocesan Suite

Census

Resolved Issues

Family Workgroups

Diocesan Staff with Appropriate Permissions Can Edit Un-owned Family Records

Previously when working in Family Workgroups, diocesan staff experienced an error when trying to edit details in family records owned by an organization other than the diocese. We fixed this issue. The system now allows diocesan staff to edit un-owned family records in any workgroups they have permission to access.

Note

Diocesan staff with an active assignment to the diocese and Family Directory View + Add/Edit permissions enabled can view, add, and edit family and member records owned by any organization within the diocese.

Diocesan Development

Resolved Issues

Imports

Lockbox and Online Giving Contributions No Longer Imported into Parish Funds

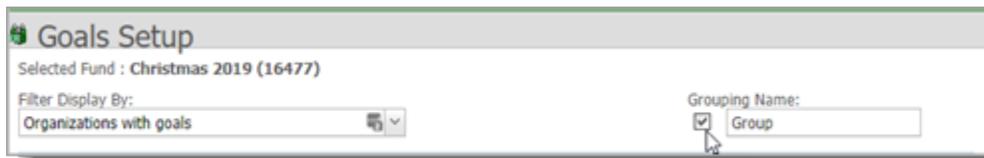
Previously in lockbox imports, pledges and contributions with the same fund ID as a parish fund were imported into the parish fund when they should have been imported into the diocesan fund. Similarly in Online Giving imports, pledges and contributions with a nonexistent diocesan fund ID but a valid parish fund ID were imported into the parish fund. We fixed these issues, specifically:

- Pledges and contributions in a lockbox file that have the same fund ID as a parish fund are now correctly imported into the diocesan fund.
- Pledges and contributions associated with a non-existent diocesan fund are no longer imported. The import report indicates the reason for the failure. The user is prompted to correct the fund ID in the import file and then retry the import.

Funds

Save Function for Add/Edit Subgroups Feature in the Goals Setup for Funds Now Working

Previously in the Goals Setup for funds, users could neither add new subgroup names nor edit existing ones because the Save function for the group naming feature did not work. We fixed this issue. The system now correctly saves added and edited group names.



Administration

Updates and Enhancements

Manage Staff

Value in Screening Category Column Now Displays As Text

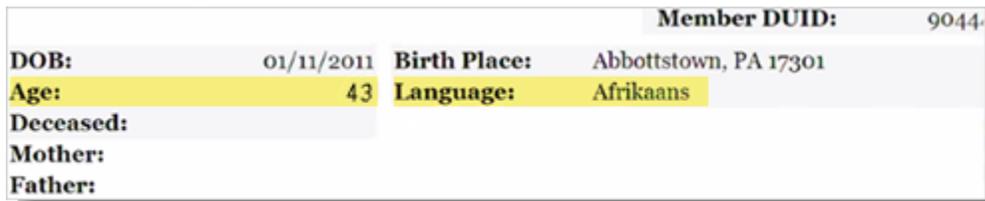
Previously in the **Manage Staff** grid, values in the **Screening Category** column were set to display as numbers (for example, 0 and 1). For usability, values in the column now display as text.

Reports

Personal Information Fields Added to the Clergy Report

As shown in the illustration below, we added the following fields to the personal information section at the top of the Clergy report:

- **Age:** records the clergy member's age. The field is located directly under the **DOB** field.
- **Language:** records the clergy member's native language. The field is located directly under the **Birth Place** field.



The screenshot shows a table with personal information for a clergy member. The fields are: Member DUID (9044), DOB (01/11/2011), Birth Place (Abbottstown, PA 17301), Age (43), Language (Afrikaans), Deceased, Mother, and Father. The Age and Language fields are highlighted in yellow.

		Member DUID:	9044
DOB:	01/11/2011	Birth Place:	Abbottstown, PA 17301
Age:	43	Language:	Afrikaans
Deceased:			
Mother:			
Father:			

Resolved Issues

Merge Families

Merge Family Queue Now Shows Correct Organization of Registration

We resolved an issue that sometimes caused the **Organization of Registration** column in the **Merge Family Queue** grid to show the name of the wrong parish.

Reports

Primary Assignment Address Inconsistencies in Clergy Report Fixed

Previously in the Clergy report, the address shown in the **Primary Assignment Address** field was sometimes inconsistent. We fixed this issue as follows:

- If the clergy member has a primary assignment, the **Primary Assignment Address** field shows the address of the organization in which the clergy holds that assignment.
- If the clergy member does not have an assignment to any organization, the **Primary Assignment Address** field is blank.

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)