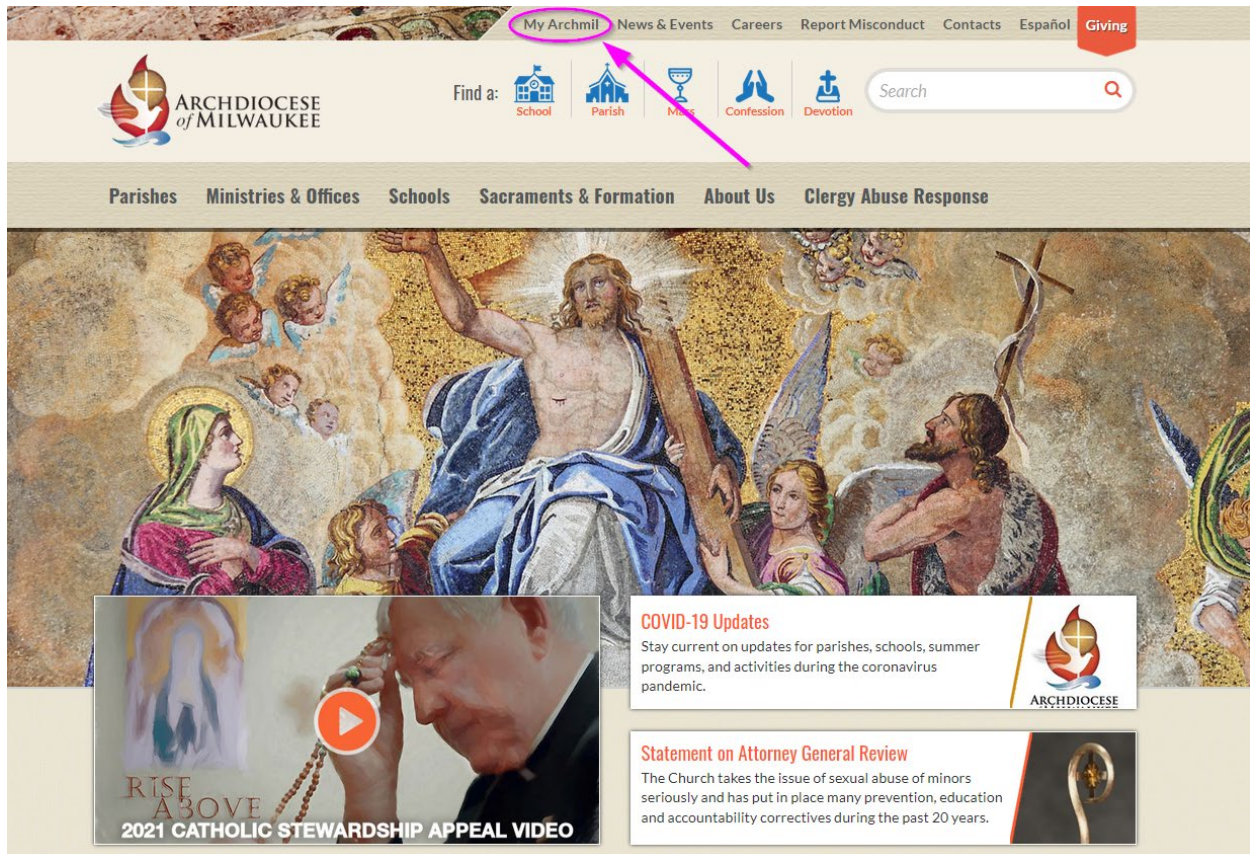# Editing Names: Parishes and Schools

Parishes and schools have the ability to edit the contact information for their staffs and volunteers on the archmil.org website. This helps assure that individuals have the appropriate access to our system and that all important communication from the central offices is delivered to the appropriate people.
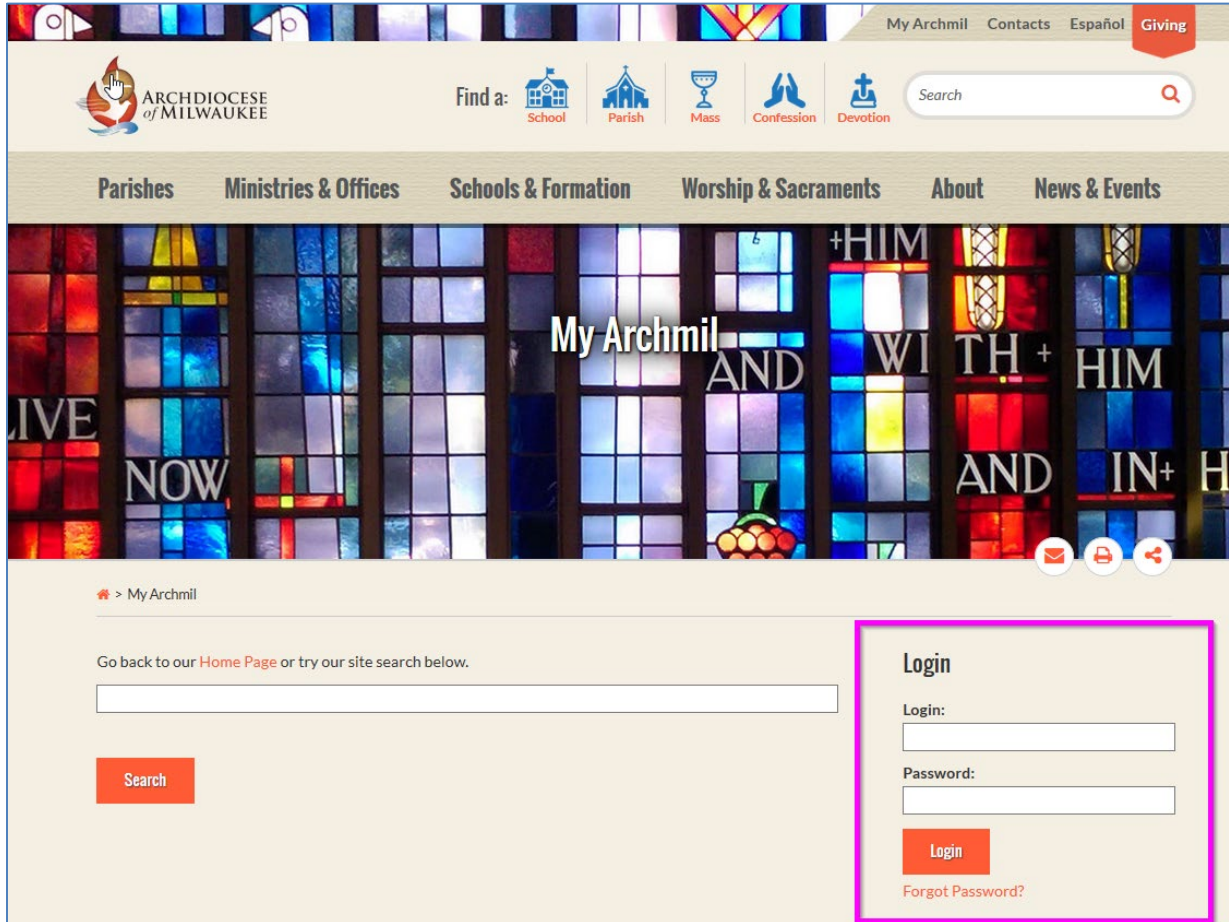
Editing Names on archmil.org

To access the **Names Maintenance** section of the site you must first log into archmil.org by clicking the **MyArchmil** link on the main blue toolbar.

Mark Barthel	**Margaret Erhart**	**Dale Klein**
Webmaster	Training Coordinator	Information Systems Specialist
barthelm@archmil.org	erhartm@archmil.org	kleind@archmil.org
414-769-3454	414-769-3335	414-769-3440

Enter your **Login** (username) and password. Click the **Login** button.

Contact the Information Systems office if you do not have your login information.

On the landing page, click the **Names** link.
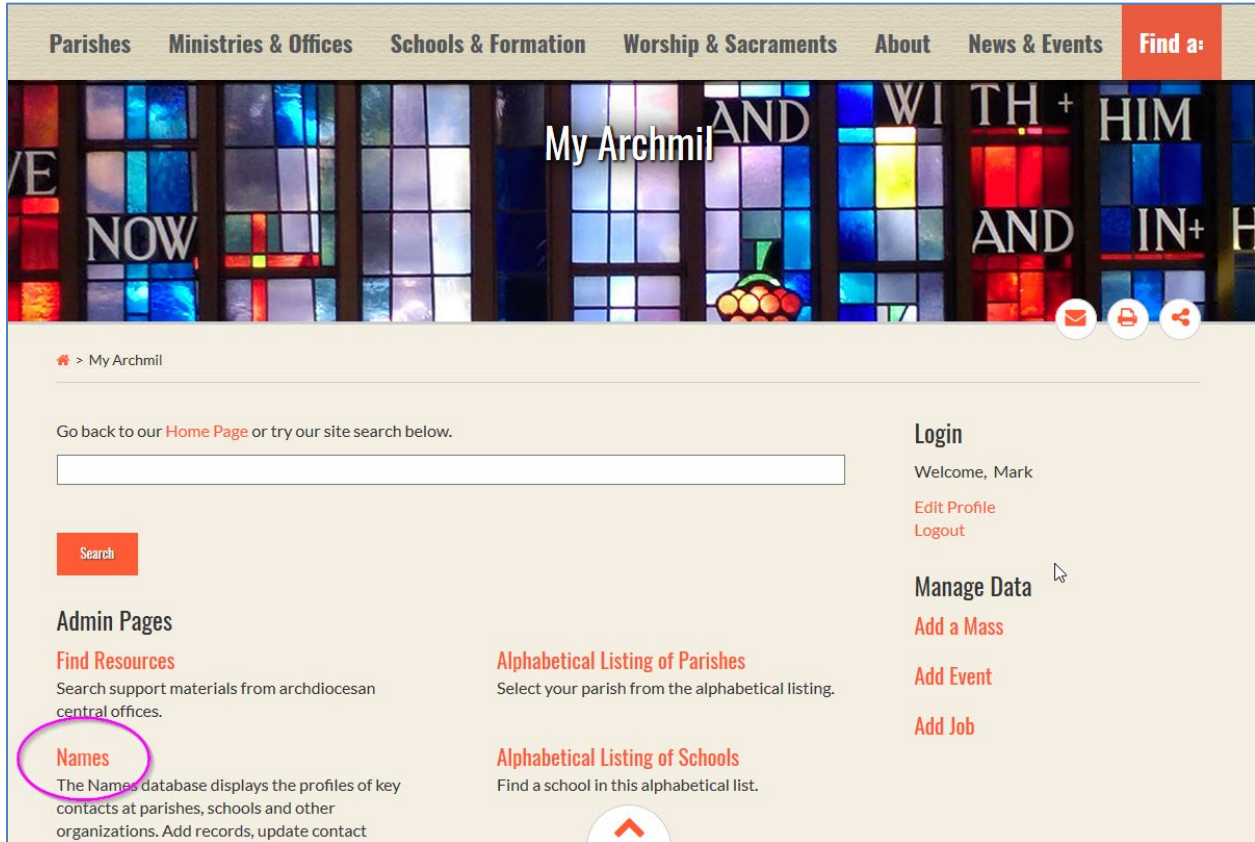
Note: The items displayed on this landing page are unique to the individual. You may not see these exact items on your screen.

Mark Barthel   **Margaret Erhart**   **Dale Klein**
Webmaster   Training Coordinator   Information Systems Specialist
barthelm@archmil.org   erhartm@archmil.org   kleind@archmil.org
414-769-3454   414-769-3335   414-769-3440

From the **Find Names** screen, you can do the following:
1.   **Request a transfer** (if you think the name you want to add is already in the system)
2.   **Add a new name**
3.   **Edit an existing name**

Request a Profile Transfer

If you want to add a name and you are confident that this person is already in our system because they worked or volunteered at another parish or school, fill out the **Profile Transfer Form** and the information systems office will check for existing records. This is important because we do not want to create duplicate records.

Mark Barthel   **Margaret Erhart**   **Dale Klein**
Webmaster   Training Coordinator   Information Systems Specialist
barthelm@archmil.org   erhartm@archmil.org   kleind@archmil.org
414-769-3454   414-769-3335   414-769-3440

Adding a Name

There are two options for adding a name.

1. Most often, you will click the **Add Name** link. Enter the individual's name and contact information (postal and e-mail addresses); the username is automatically assigned.
2. You will only use **Add Name with Login** when adding someone on your staff who needs to log into our system themselves (e.g. business managers, secretaries, benefit coordinators, bookkeepers, etc.). If you use this option, you will create a unique Username and Password for the individual.

Continued on next page…

1. Using Add Name

Enter the person's name and contact information, as well as, preferences for email and postal mail.

Identification Information

Prefix: [ ]

FirstName: [Demo] MI: [ ]

Last Name: [Account] Suffix: [ ]

Organization: [ ] Position: [Web Sample]

Contact Information
Home Contact

Address 1: [1234 Your St] Address 2: [ ]

City: [Anytown] State/Zip: [WI ∨] [54321]

County: [Select County ∨] Email: [account@yourdomain.com]

Phone: [ ] Ext. [ ] Fax: [ ]

Work Contact

Address 1: [ ] Address 2: [ ]

City: [ ] State/Zip: [-- ∨] [ ]

County: [Select County ∨] Email: [ ]

Phone: [ ] Ext. [ ] Fax: [ ]

E-mail Preferences
Please select the user's preferred e-mail address: home, work or both.
☑ **Send to home email**
☐ **Send to work email**

Mail Preferences
Please select the user's preferred postal mailing address: home or work.
◉ **Send mail to home address**
○ **Send mail to work address**
Classify this User
Ensures that this person receives all appropriate mailings.
Choose all Tags and subsequent Values appropriate to this person's location, position, ministry, etc. Then click the green arrow button ( ) to confirm the

Continued on next page…

Mark Barthel **Margaret Erhart** **Dale Klein**
Webmaster Training Coordinator Information Systems Specialist
barthelm@archmil.org erhartm@archmil.org kleind@archmil.org
414-769-3454 414-769-3335 414-769-3440

Adding a Classification (Tag)

The bottom section of the Edit Name screen provides a way to assign tags to the individual. **These tags identify a person's parish or school, ministries, subscriptions, etc.** Individuals can have multiple tags.

To add a tag to a person's record:
1. **Select a Tag in the left column**
2. **Select one or more options from the middle column**
3. **Click the green arrow button to complete the selection**

Finally, click the **Save & Continue** button to complete the process.

Note: The person is automatically assigned the same parish and school locations as you. If you are the Names administrator for more than one location this may or may not be appropriate for the individual so uncheck any parish and/or school tags not appropriate for this individual before saving.

Mark Barthel   **Margaret Erhart**   **Dale Klein**
Webmaster   Training Coordinator   Information Systems Specialist
barthelm@archmil.org   erhartm@archmil.org   kleind@archmil.org
414-769-3454   414-769-3335   414-769-3440

2. Using **Add Name with Login** (Only needed for those who login themselves)

Adding a name with login is the same process as previously mentioned but there are some additional tasks. You will need to **create a username** and **temporary password.**

Usernames must be unique, some examples are *firstname.lastname or firstinitial+lastname.* It can literally be anything as long as it is unique to the individual and our system. Passwords must be at least six characters long and should contain upper and lower case letters and at least one number.

Assign any Classifications (Tags) as previously mentioned. However, you must also assign the correct **User Security**.

Making the person an **Author** for your parish or school gives them the ability to post jobs and events.

Assigning the security permissions (**Groups or Roles**) is required for those who will need to access secure information on our websites. In essence, it gives them the ability to login themselves to access all information available for their position or ministry.

Editing a Name

To edit a name, use the **Keyword** search and/or the **Filters** to find the person's record.

In the keyword field, you can enter the first name, last name, first and last name, e-mail, or the person's username. For example, if you enter the last name *Smith*, the system will display every person at your location with the last name of Smith. If you enter *John Smith*, the system will only display the records that match the first name John and the last name Smith.

Note that you can check Starts with, Contains, or Exact Match to narrow the results.

Screen continued on next page…

Click the **Search** button to run the query.

Note: If you do not enter any keywords or select any tags from the filter selection, all names for your location are displayed.

The results of your search will appear below the Search button.

The records are displayed alphabetically by the person's last name. Home and Work contact information is shown as well as the Status of the record.

Click the **Edit** link to open the profile to update an address, email or to add or remove tags.

Clicking the **Edit Full Profile** link is the same as the Edit link but also allows you to add security tags for those who need to login themselves.

Using the Edit Link

Clicking **Edit** displays the individual's profile. From here, you can **update contact information** like postal and email addresses. You can enter home information, work information or both if appropriate.

You can also select where both postal and email are sent.

Edit Name
- **Do not use the Back button** at any time during the editing process
- **Complete** as much Contact information as possible
- Assign the appropriate **Tags and User Security** settings

☑ **Is Active**

Identification Information

Prefix: [ ]

FirstName: Demo   MI: [ ]

Last Name: Account   Suffix: [ ]

Organization: DO NOT DELETE   Position: Web Administrator

Contact Information
Home Contact

Address 1: 456 Home Ave   Address 2: [ ]

City: Anytown   State/Zip: WI ⌄ 12345

County: Select County ⌄   Email: [ ]

Phone: 123-456-7890 Ext. [ ]   Fax: [ ]

Work Contact

Address 1: 123 Work St   Address 2: [ ]

City: Anytown   State/Zip: WI ⌄ 12345

County: Select County ⌄   Email: demo@archmil.org

Phone: [ ] Ext. [ ]   Fax: [ ]

E-mail Preferences
Please select the user's preferred e-mail address: home, work or both.
☐ **Send to home email**
☑ **Send to work email**

Mail Preferences
Please select the user's preferred postal mailing address: home or work.
○ **Send mail to home address**
◉ **Send mail to work address**

Screen continued on next page…

The bottom section of the Edit Name screen displays the current Tags assigned to the individual. These tags identify a person's parish or school, ministry, etc.

Using the **Edit Full Profile** link lets you assign security tags to an existing profile.

Making the person an **Author** for your parish or school gives them the ability to post jobs and events.

Assigning the security permissions (**Groups or Roles**) is required for those who will need to access secure information on our websites. In essence, it gives them the ability to login themselves to access all information available for their position or ministry.

Office for Information Systems   May 10, 2021
   Mark Barthel   **Margaret Erhart**   **Dale Klein**
   Webmaster   Training Coordinator   Information Systems Specialist
   barthelm@archmil.org   erhartm@archmil.org   kleind@archmil.org
   414-769-3454   414-769-3335   414-769-3440

Editing a Classification (Tag)

To edit a tag on a person's record:
1. **Select a Tag in the left column**
2. **Select one or more options from the middle column**
3. **Click the green arrow button to complete the selection**

Finally, click the **Save & Continue** button to complete the process. (not shown)

Note: Assigning security permissions works in a similar fashion.

Removing a Tag classification

Simply **uncheck the box** next to the selected value (it will turn into a red X) and click the **Save & Continue** button.

Removing tags is especially important for those records where there is a significant level of turnover (e.g. parish council members, committee members, faculty, etc.).

Office for Information Systems   May 10, 2021
   Mark Barthel   **Margaret Erhart**   **Dale Klein**
   Webmaster   Training Coordinator   Information Systems Specialist
   barthelm@archmil.org   erhartm@archmil.org   kleind@archmil.org
   414-769-3454   414-769-3335   414-769-3440

Deleting a Name

There are two steps for deleting a name.

1. Uncheck, the **Is Active** field
2. **Remove the Tags** associated with your location.
3. Click **Save & Continue**