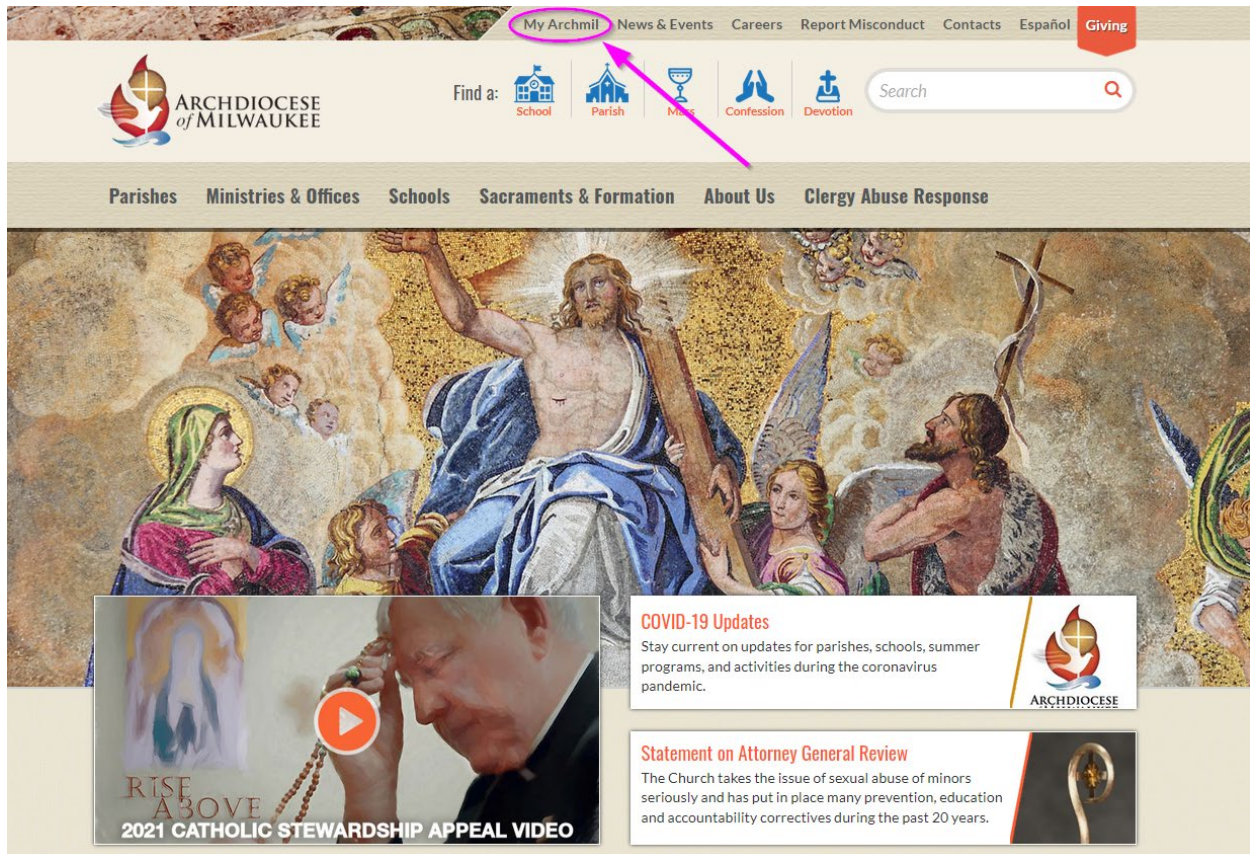


## Editing Names: Parishes and Schools

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.

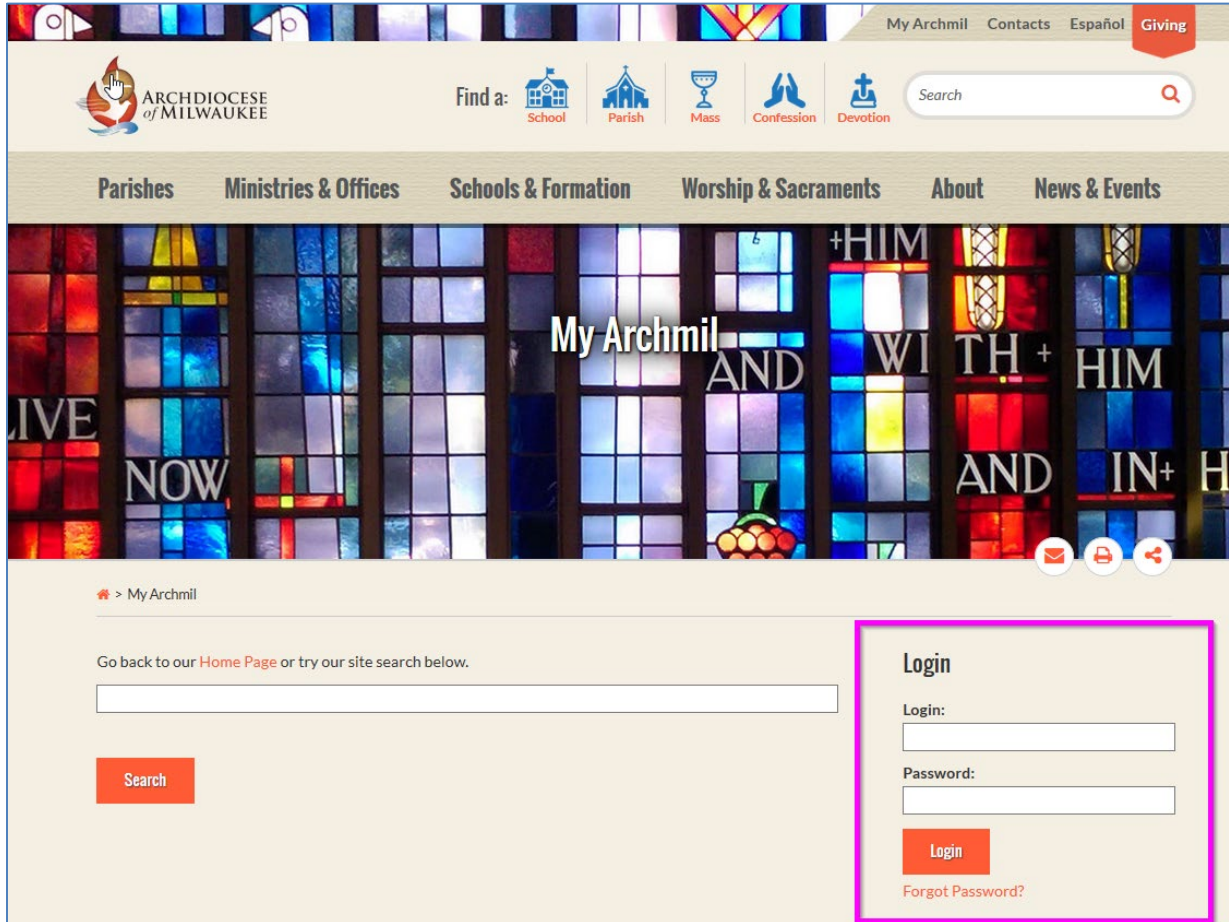
### Editing Names on archmil.org

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.



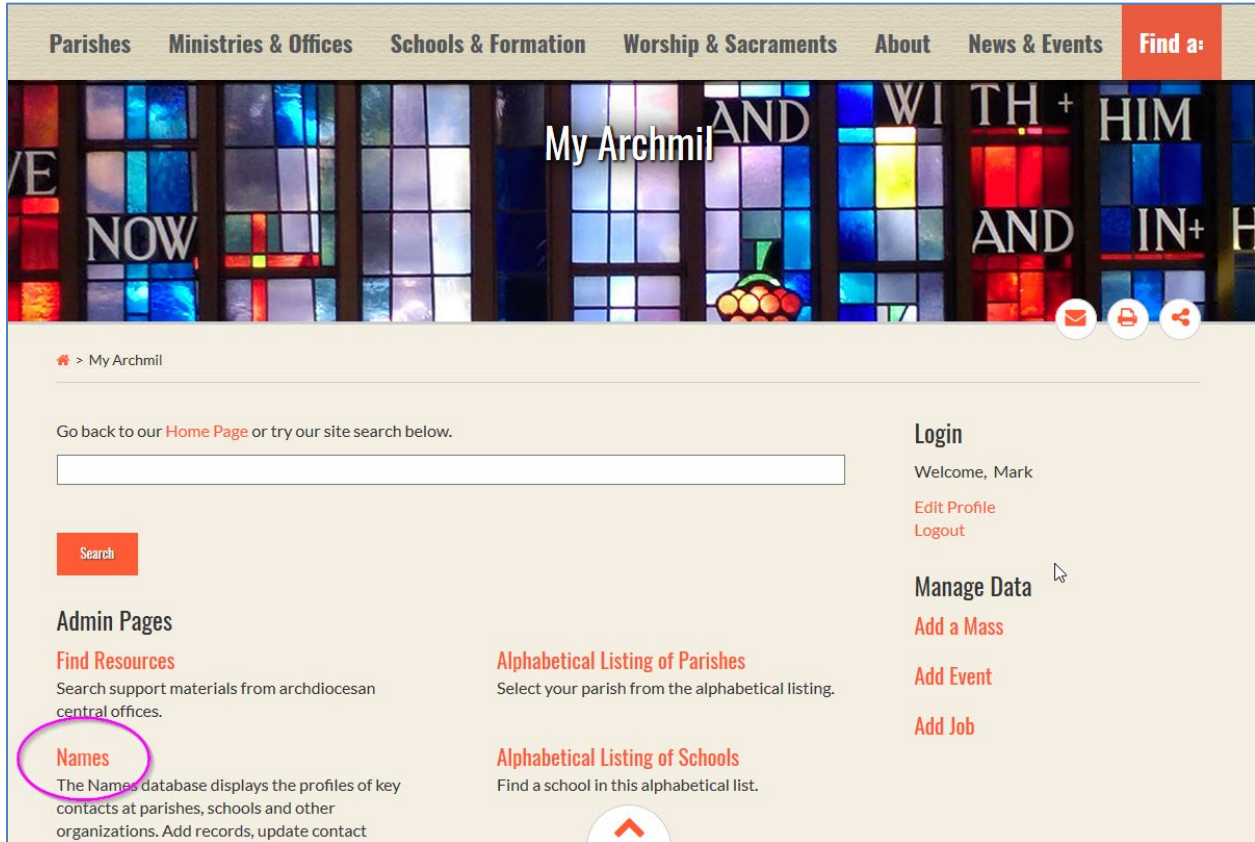
The screenshot shows the top navigation bar of the Archdiocese of Milwaukee website. The 'My Archmil' link is circled in pink and has a pink arrow pointing to it. Other navigation links include News & Events, Careers, Report Misconduct, Contacts, Español, and Giving. Below the navigation bar is the Archdiocese of Milwaukee logo and a search bar. The main content area features a large religious painting and several news items, including 'COVID-19 Updates' and 'Statement on Attorney General Review'. A video player for 'RISE ABOVE 2021 CATHOLIC STEWARDSHIP APPEAL VIDEO' is also visible.

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.

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**

**Adding a Name**  
Is the person you're trying to add already in the system?

Did the person work or volunteer at another parish or school?

If you're confident that the person you are adding is already in our system because they worked or volunteered at another parish or school, fill out **Profile Transfer Form** the and we will check for existing records.

**Creating a Username & Password are no longer required!**

There are now two options for adding a name.

- Most often, you will click the **Add Name** link. Enter the individual's name and contact information.
- You will only use **Add Name with Login** for those people on your staff who need to log into our system themselves.

**Editing an existing Name**  
Use this **Find Names** screen to display people affiliated with your location.

- Use the **Keyword** field to search for a person by name or email.
- Use the **Filters** to display anyone assigned a specific Tag.
- Use a **combination of keywords and filters** to narrow the results even further.
- Leave the **Keyword and Filters blank** and click **Search** to see all names associated with your location.

**Find Names** | [Add Name](#) | [Add Name with Login](#)

Keyword:

Starts With |  Contains |  Exact Match

Filters: [hide filters](#)

Tags	Available Values	Selected Values
County		<b>School</b>
Deanery		<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Development		

### 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.



## 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.

**ARCHDIOCESE of MILWAUKEE**

Find Resources   Manage Data   **Names**   Priest Compensation Workbook   Return to ArchMil.org

**Adding a Name**  
Is the person you're trying to add already in the system?

Did the person work or volunteer at another parish or school?

If you're confident that the person you are adding is already in our system because they worked or volunteered at another parish or school, fill out [Profile Transfer Form](#) and we will check for existing records.

**Creating a Username & Password are no longer required!**

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**Editing an existing Name**

Use this **Find Names** screen to display people affiliated with your location.

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- Use the **Filters** to display anyone assigned a specific Tag.
- Use a **combination of keywords and filters** to narrow the results even further.
- **Leave the Keyword and Filters blank** and click **Search** to see all names associated with your location.

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**Find Names**   [Add Name](#) | [Add Name with Login](#)

Keyword:

Starts With  
  Contains  
  Exact Match


Filters: [hide filters](#)

Tags	Available Values	Selected Values
County		<b>School</b>
Deanery		<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Development		
Ecumenical		
Finance		
Hispanic Ministry		
HR Positions		

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.

<b>Identification Information</b>	
Prefix:	<input type="text"/>
FirstName:	<input type="text" value="Demo"/> MI: <input type="text"/>
Last Name:	<input type="text" value="Account"/> Suffix: <input type="text"/>
Organization:	<input type="text"/> Position: <input type="text" value="Web Sample"/>
<b>Contact Information</b>	
<b>Home Contact</b>	
Address 1:	<input type="text" value="1234 Your St"/> Address 2: <input type="text"/>
City:	<input type="text" value="Anytown"/> State/Zip: <input type="text" value="WI"/> <input type="text" value="54321"/>
County:	<input type="text" value="Select County"/> Email: <input type="text" value="account@yourdomain.com"/>
Phone:	<input type="text"/> Ext. <input type="checkbox"/> Fax: <input type="text"/>
<b>Work Contact</b>	
Address 1:	<input type="text"/> Address 2: <input type="text"/>
City:	<input type="text"/> State/Zip: <input type="text" value="--"/> <input type="text"/>
County:	<input type="text" value="Select County"/> Email: <input type="text"/>
Phone:	<input type="text"/> Ext. <input type="checkbox"/> Fax: <input type="text"/>
<b>E-mail Preferences</b>	
Please select the user's preferred e-mail address: home, work or both.	
<input checked="" type="checkbox"/> Send to home email	
<input type="checkbox"/> Send to work email	
<b>Mail Preferences</b>	
Please select the user's preferred postal mailing address: home or work.	
<input checked="" type="radio"/> Send mail to home address	
<input type="radio"/> Send mail to work address	
<b>Classify this User</b>	
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...

## 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.

**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 selection.

Tags	Parish Pastoral Council	Selected Values
Liturgy and music	Chair	<b>Parish</b>
Parish	Vice-Chair or Chair Elect	<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Parish Finance Council	Secretary	<b>School</b>
Parish Groups	Member at Large	<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Parish Pastoral Council	Christian Formation Chair	
Religious Ed	Human Concerns Chair	
School	Prayer and Worship/Liturgy Chair	

**Save & Continue**   **Cancel**

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.

## 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**.

Username 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.

The screenshot shows a user registration form with two main sections:

- Login Information:** Contains three input fields: Username, Password, and Password Confirmation.
- Identification Information:** Contains several input fields: Prefix, FirstName, MI, Last Name, and Suffix.

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

The screenshot shows the 'User Security' configuration form with the following details:

- Header:** 'User Security' with a note: 'Only applies to people who will login themselves!' and a sub-note: 'Please select "Author" below if this user is allowed to manage data for their assigned parishes and/or schools. (e.g. posting a job or event)'
- Editing Options:** Radio buttons for 'Parish Editing' and 'School Editing', each with 'None' and 'Author' options. 'Author' is selected for both.
- Instructions:** 'Choose the roles and additional permissions for this user if they need their own access to the system. Then click the green arrow button (img) to confirm the selection. (Most users will have no values selected)'
- Permissions Section:** A table with columns for 'Permissions' (Groups, Additional Permissions, Role) and 'Role' (Business Managers/Dir. of Admin. Services, Parish - Bookkeeper, Parish - Secretary/Admin. Assistant, Parish - Staff, PI34 Educator, Religious Ed - Religious Ed/Youth Ministrv. Administrator).
- Selected Values Section:** A table with 'Groups' and one entry: 'Editor - Names' with a checked checkbox.
- Buttons:** 'Save & Continue' and 'Cancel' at the bottom.

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

**Adding a Name**  
Is the person you're trying to add already in the system?

Did the person work or volunteer at another parish or school?

If you're confident that the person you are adding is already in our system because they worked or volunteered at another parish or school, fill out **Profile Transfer Form** the and we will check for existing records.

**Creating a Username & Password are no longer required!**

There are now two options for adding a name.

- Most often, you will click the **Add Name** link. Enter the individual's name and contact information.
- You will only use **Add Name with Login** for those people on your staff who need to log into our system themselves.

**Editing an existing Name**  
Use this **Find Names** screen to display people affiliated with your location.

- Use the **Keyword** field to search for a person by name or email.
- Use the **Filters** to display anyone assigned a specific Tag.
- Use a **combination of keywords and filters** to narrow the results even further.
- **Leave the Keyword and Filters blank** and click **Search** to see all names associated with your location.

**Find Names**    [Add Name](#) | [Add Name with Login](#)

Keyword:

Starts With     Contains     Exact Match

Filters: [hide filters](#)

Tags	Available Values	Selected Values
County		<b>School</b>
Deanery		<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Development		
Ecumenical		
Finance		
Hispanic Ministry		
HR Positions		

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.

**Find Names** [Add Name](#) | [Add Name with Login](#)

Keyword:

Starts With     Contains     Exact Match

Filters: [hide filters](#)

**Tags**

- County
- Deanery
- Development
- Ecumenical
- Finance
- Hispanic Ministry
- HR Positions

**Permissions**

- Groups
- Additional Permissions
- Role

**Available Values**

**Selected Values**

**School**

- St. Test - Anytown (A99)

**Search**

---

Showing  of 23 [Update Results](#)

Name	Address	Contact	Status
<a href="#">Edit</a> <a href="#">Edit Full Profile</a>	Account, Demo W: 123 Work St Anytown, WI 12345 H: 456 Home Ave Anytown, WI 12345	W: <a href="mailto:barthelm@archmil.org">barthelm@archmil.org</a> H: 123-456-7890 <a href="mailto:barthell@archmil.org">barthell@archmil.org</a>	Active
<a href="#">Edit</a> <a href="#">Edit Full Profile</a>	Barthel, Ben H: 123 Main St Anytown, WI 55555		Active

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:  MI:

Last Name:  Suffix:

Organization:  Position:

**Contact Information**

**Home Contact**

Address 1:  Address 2:

City:  State/Zip:

County:  Email:

Phone:  Ext.  Fax:

**Work Contact**

Address 1:  Address 2:

City:  State/Zip:

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

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.

**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 selection.

Tags	School Groups	Selected Values
Parish Pastoral Council	School Committee / Board Chairperson	<b>School</b> <input checked="" type="checkbox"/> St. Test - Anytown (A99)
Religious Ed	School Committee / Board Member	<b>School Groups</b> <input checked="" type="checkbox"/> School Web Administrators
School	School Nurse	
School Groups	School Staff 	
Social Action	School Volunteer	
State	Secretary/Admin. Assistant	
Students	Supportive Consultants	

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

**User Security**  
 Only applies to people who will login themselves!  
 Please select "Author" below if this user is allowed to manage data for their assigned parishes and/or schools. (e.g. posting a job or event)

**Parish Editing**   **School Editing**  
 None    None  
 Author    Author

Choose the roles and additional permissions for this user if they need their own access to the system. Then click the green arrow button  to confirm the selection. (Most users will have no values selected)

Permissions	Available Values	Selected Values
Groups		<b>Groups</b> <input checked="" type="checkbox"/> Editor - Names
Additional Permissions		<b>Additional Permissions</b> <input checked="" type="checkbox"/> List Children
Role		<b>Role</b> <input checked="" type="checkbox"/> Web Administrators - School

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 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)

**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 selection.

Tags	School Groups	Selected Values
Parish Pastoral Council	School Committee/Board Member	<b>School</b>
Religious Ed	School Nurse	<input checked="" type="checkbox"/> St. Test - Anytown (A99)
School	School Staff	<b>School Groups</b>
<b>School Groups</b> 1	School Volunteer 2	<input checked="" type="checkbox"/> School Web Administrators
Social Action	Secretary/Admin. Assistant 3	
State	Supportive Consultants	
Students	Technology Coordinator	

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.

**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 selection.

Tags	Available Values	Selected Values
County		<b>School</b>
Deanery		<input checked="" type="checkbox"/> St. Test - Anytown (A99)
Development		<b>School Groups</b>
Ecumenical		<input checked="" type="checkbox"/> School Staff
Finance		<input checked="" type="checkbox"/> School Web Administrators
Hispanic Ministry		<input checked="" type="checkbox"/> Secretary/Admin. Assistant
HR Positions		

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.).

## 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**

**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:  MI:

Last Name:  Suffix:

Organization:  Position:

**Contact Information**

**Home Contact**

Address 1:  Address 2:

City:  State/Zip:

County:  Email:


Phone:  Ext.  Fax:

**Work Contact**

Address 1:  Address 2:

**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 selection.

Tags	Available Values	Selected Values
<ul style="list-style-type: none"> <li>County</li> <li>Deanery</li> <li>Development</li> <li>Ecumenical</li> <li>Finance</li> <li>Hispanic Ministry</li> <li>HR Positions</li> </ul>		<p><b>School</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> St. Test - Anytown (A99)</li> </ul> <p><b>School Groups</b></p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> School Staff</li> <li><input checked="" type="checkbox"/> School Web Administrators</li> <li><input checked="" type="checkbox"/> Secretary/Admin. Assistant</li> </ul>