

Super Admin Functions (System Admin Functions)

- Background: Kinds of users:** Users are persons who interact with the system. They fall into one of three types.
 - Basic User:** these users are restricted to the tasks they can perform. Users who will edit a Fraternity or a Province would normally be assigned to this level. The general tasks they can perform are listed at the left of the page. Tasks specific to an organization will appear on the right side of an organization's summary pages.
 - Admin user:** these users are trusted with tasks which require following special rules. Normally there will be at least one for each region. The additional tasks will also appear on the right.
 - Super Admin user:** these users are trusted with system level tasks in addition to normal Admin tasks. These tasks will appear as 'System Functions' on the left of many pages. They primarily involve the creation of and editing of all kinds of users and assigning access (see below). They also qualify persons who must meet certain criteria (e.g., knowing that a person has met the criteria to be assigned as a Spiritual Assistant or assigning to a user the permissions to view or edit information about an organization and or persons assigned to that organization).
- The menu:** If a user has Super Admin permissions a Special Menu will appear on the left below the general User's menu on all Organization Summary Pages. This section will not appear on any pages for a user who is not a Super Admin.



- Clicking on: **Add a New User** opens the Add a new user form. For username enter the email address which matches the 1st email address for a person already in the system. This means that all users must first be persons in the system. Also, if the 1st email address changes, the system will automatically adjust the username when it runs nightly cleanup tasks. Enter the password and select whether the user's role is 'User' or 'Admin'

Click on **SUBMIT** to confirm the creation of the user. If it successful, the blank form redisplay.

Click on **RETURN TO ORG SUMMARY** to either abandon a partial entered user or to return to the organization summary page.

A screenshot of the "Add a New User" form. At the top left is a green button labeled "RETURN TO ORG SUMMARY". Below it are several input fields: "User Email*" (with a dropdown arrow), "User Name*" (containing "Judith Mussetta"), "Person ID*" (containing "3577"), "Password*" (with masked characters), and "Confirm Password*" (with masked characters). Below these is a "Role" dropdown menu set to "User" and a checked "Active user*" checkbox. At the bottom left is a "Reset" button and at the bottom center is a large green "SUBMIT" button.

- Click on **Edit a User** to alter an existing user (including making an Admin user a Super Admin). The Edit User form will appear. User Name is the Person's Name. It is an auto-complete field which means if you enter part of the name a drop-down list of possible choices will appear. Select the name from the list which is displayed. Then click on

SEARCH

User ID	Name	Email	Active	role name	Role	super admin
3577	Judith Mussatto	jmussatto@earthlink.net	Yes	User	2	No

You can delete a user by clicking on 'X Delete' at the right of the line. The system will ask you to confirm removing the user record. If you click on **Edit** This will cause the user to become editable.

Select **User** or **Admin**. If you select **Admin** you can check the Super Admin checkbox. Note the Role number will automatically change to match the role name (1 for Admin and 2 for User) Click on **UPDATE** to save the changes.

- Clicking on **Set User Permissions** to set/alter the permissions (read or edit) for each organization. To search for a user enter the user's name started by the user's Last name. This is an auto complete field so you will be given a list of possible matches. Click on the correct user and then click on **SUBMIT** to deal with that user.

- a. 1st select the parent organization: **OFS-USA** (all the regions and their fraternities), **International _ OFS** (National Fraternities, e.g, CIOFS – Rome, OFS -USA) , **Other Entities** (e.g., Barbo_Carlson, Franciscan Resources), **Religious Orders** (e.g, 1st orders and their provinces, various orders of Sisters), and **USCCB** (all the diocese). Unless you just want the user to *only* work with Active organizations, clear the Active Only check box and press **SEARCH** .

- b. It will display a list of possible top-level organizations, for OFS-USA this will be the Regions. If you check one of the top-level boxes it will automatically select all the organizations under it. For example, clicking on the Blessed Solanus Casey check box will select that region and all the fraternities within the region. To select an individual organization click on the **+** which will expand the list of organizations. Note: the region should be the 1st of organizations in a region. Check all the organizations for which you want to set the read **or** edit permissions.

In this case all of Blessed Solanus Casey Region (Region and all is fraternities) and Brothers and Sisters of Saint Francis Regional Fraternity, Franciscan Martyrs Fraternity and Unknown People to Check... pseudo fraternity are selected. Then click on the  **Edit** icon.

Set User Permissions

How to use this page:
 Step 1 - Select the Organization and press the SEARCH button.
 Step 2 - Check the box for the Organizations you would like to edit.
 Step 3 - Click on the EDIT link above the checkboxes to make your changes.

User:
 Organization:
 Active Only:

SEARCH

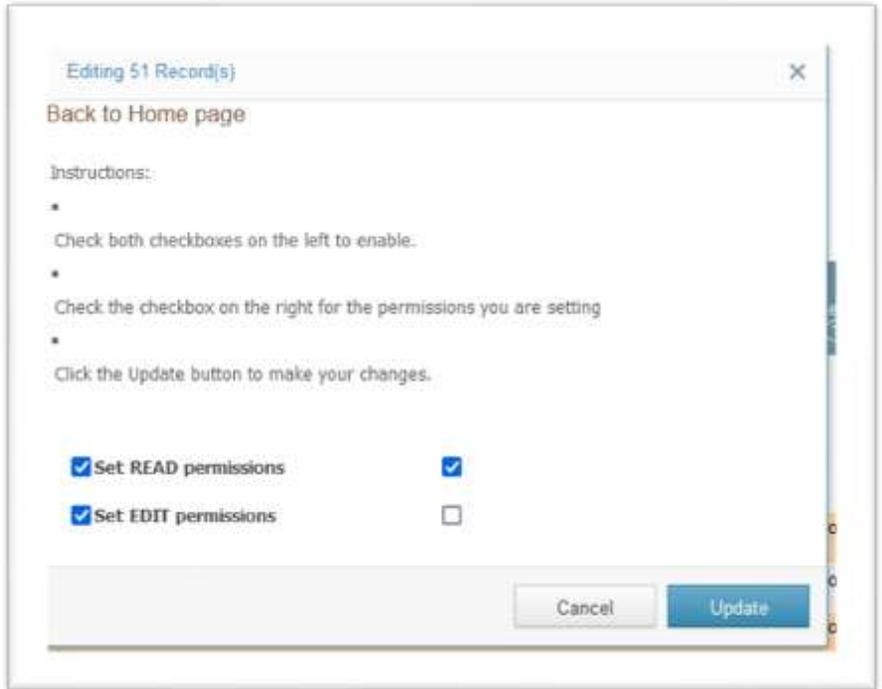
CLICK HERE TO SELECT ANOTHER USER OR EXIT

 Edit

	Level_0	Level_1	tbi org hierarchy master.org unit number	Level_2
<input type="checkbox"/>	<input checked="" type="checkbox"/>		OFS-USA	
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Blessed Solanus Casey--CT	
<input type="checkbox"/>		<input checked="" type="checkbox"/>	Brothers and Sisters of Saint Francis-unknown---	
<input type="checkbox"/>			61	Brothers and Sisters
<input type="checkbox"/>			10402	San Damiano Fratern

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Blessed Solanus Casey--CT	
<input type="checkbox"/>	<input type="checkbox"/>		Brothers and Sisters of Saint Francis-unknown--- Select a State --	
<input checked="" type="checkbox"/>		61	Brothers and Sisters of Saint Francis-unkn State --	
<input type="checkbox"/>		10402	San Damiano Fraternity Athens Inactive-At	
<input checked="" type="checkbox"/>		13201	Franciscan Martyrs of Siroki Brijeg-Blairsvil	
<input checked="" type="checkbox"/>		99901	Unknown People to Check & Transfer Out-l	

- c. Follow the instructions in the popup box. Check both the Set Read and Set Edit checkboxes on the left and then select the checkbox on the right for *either* Read or Edit permission and then check [Update](#) button. The system will then install the permissions you have set. If you need to do both Read and Edit for different organizations do the Read and Edit separately.

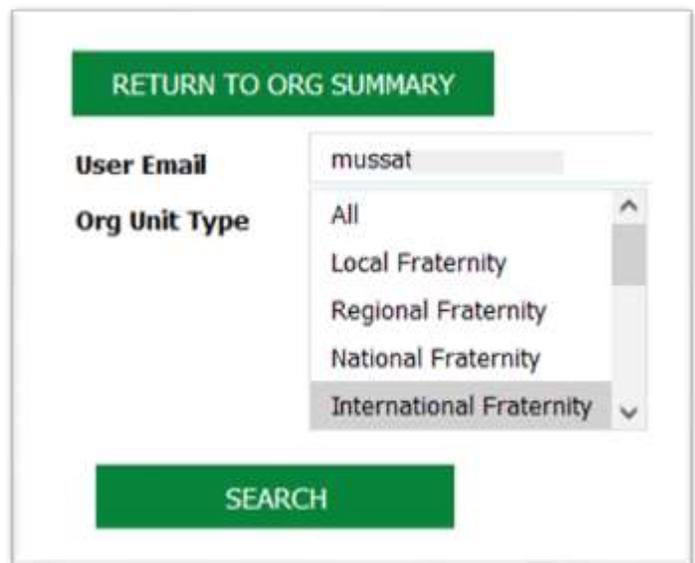


- d. Once this is done you can check the results by expanding the organization and looking under the columns at the right.

<input type="checkbox"/>	53	Saint Junipero Serra-Napa-CA	Regional Fraternity	Yes	Yes	No	wmus	
<input type="checkbox"/>	14601	Sung Antonio-San Francisco-CA	Local Fraternity	Yes	Yes	No	wmus	
<input type="checkbox"/>	11901	Sacred Heart-San Jose-CA	Local Fraternity	Yes	Yes	No	wmus	
<input type="checkbox"/>	12201	Saint Michael-San Miguel-CA	Local Fraternity	Yes	Yes	No	wmus	
<input type="checkbox"/>	12601	Saint Mary-Visalia-CA	Local Fraternity	Yes	Yes	No	wmus	

The three columns are the organization is **Active** (Yes/No), **Read** permission (Yes/No) and **Edit** permission (Yes/No) followed by the email address of the user.

- e. When you are done click on [CLICK HERE TO SELECT ANOTHER USER OR EXIT](#) to either chose another user or on the next screen return to the Org Summary page you came from.
6. Clicking on [View User Permissions](#) link will display a selection form. Find the user's email in the list. This will display the organization to which this user has access. For example, if the user has access to only Local Fraternities and a Regional Fraternity, only those will appear in the drop down. This user has access to everything, so all the types are displayed. To select more than one type hold down the 'Ctrl' key. Click on [SEARCH](#) to display the results.



User Email	Org Unit Number	Org Unit ID	Org Unit Name	Org Unit Type	Read Only	Edit	Admin (1), User (2)
mussatto@acm.org							
		30011	CIOFS-ROME	International Fraternity	No	Yes	
		40011	International - OFS	International Fraternity	No	Yes	

In this case the user has access to CIOFS-Rom and International OFS
 In both cases it is Edit Access. It also show a 1 for Admin or 2 for User
 Repeat for any other users you are interested in. When complete click on [RETURN TO ORG SUMMARY](#) level access.

- Click on [Qualify Person as Spiritual Assistant](#) which will open a search box where you can enter the name (or part of a name) of a person. You can limit the search by selecting the Suffix (OFS in this case). Click on [SEARCH](#) to see the results.

Select Person to Qualify as Spiritual Assistant

[RETURN TO ORG SUMMARY](#)

Last Name:

First Name:

Name Suffix:

[SEARCH](#)

Last/First/Middle	Primary Membership Org Unit	Name Suffix	Qualified as Spiritual Assistant	Active Flag	
Mussatto, Judith Bernice	Holy Spirit-Clermont-CA	OFS	<input type="checkbox"/>	Yes	UPDATE
Mussatto, William Roland	Holy Spirit-Clermont-CA	OFS	Yes	Yes	Edit

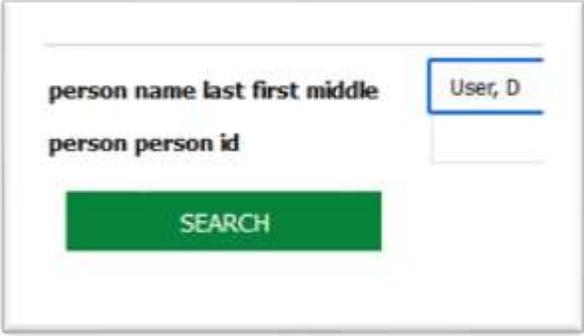
If you click on [Edit](#) This will display a check box under qualified as Spiritual Assistant. Check it to qualify the person or uncheck it to remove their qualification. Then click on the [UPDATE](#) button to record the change. After a pause it will redisplay the line with the Yes/No value. Remember you need to have proper documentation from the organization which certifies the person as well prepared and suitable. Similarly, you should have proper documentation when a person is no longer considered suitable and well prepared. When you are done click on the [RETURN TO ORG SUMMARY](#) button to return to the Organization Summary page.

8. The last function allows the super Admin to edit any person in the system. Click on [Search/Edit Person](#) and a Search form will open.

a. Enter the person's name or the person ID. Click on **SEARCH** and an edit person form will be displayed. The only difference from finding a person under an organization and editing it there is you don't have to drill down to the organization. See Documentation on Create a New Member (paragraph 5 and following) on how to do this.

b. At the bottom of a form is a special check box **Person Deleted**. Deleting a person will hide the person from most searches and lists, including the global search function (but not from the Super Admin's search, of course). In most cases, we do not want to delete a person if there is any history associated with them. Just to be sure, we do not remove any person records completely from the database. Since it's a check box, unchecking it will restore the user, *but* not all the associated records (e.g., TAU distribution, User Permissions) will be re-activated.

c. Why can't I add a person here? Persons are members of an organizational unit and they have to be added from the proper organization's summary screen so they are properly associated with that organization.



The image shows a search form with two input fields. The first field is labeled "person name last first middle" and the second is labeled "person person id". A green "SEARCH" button is positioned below the second field. To the right of the form, a dropdown menu is open, displaying "User, D".