

Parish Portal Help

Administering Roles in the Parish Portal

A Portal Administrator for a parish has the ability to determine who in their parish should be contacted regarding different matters and who should be provided access to content on the Parish Portal. This is accomplished by editing the “Roles” assigned to each person.

For example, a portal administrator may –

- assign the “Finance” Role to a bookkeeper, to receive financial communications and have access to the financial content of the portal
- assign the “Property” Role to a property manager or parish councillor responsible for property, to have access to property content on the portal and receive email alerts to content changes.
- deselect certain Roles from the Rector, to reduce the volume of communications received
- assign all Roles to an individual (e.g. a parish administrator) who needs to be aware of everything.

...the Portal Administrator may even assign other members of the parish to hold administrator rights over the parish portal, in addition to the Rector.

Steps to administer Roles

1. Only Parish Portal Administrators (the Rector plus any others he assigns that Role to) can administer the Roles of others. Wardens can manage their own preferences via their personal profile page (when logged in, click on login name at top-right of the webpage.)
2. The Rector and parish officers (wardens, nominators, Synod representatives, etc) are listed on the **MANAGE PERMISSION** page, along with the Roles they hold by virtue of their appointment(s) to the parish. People who have previously been associated with the parish as a parish officer are listed further down the page.
3. Click on the menu (“ : “) next to an individual and select “Edit account” to modify their Role(s). A window will open entitled ‘Roles (Distribution lists and Portal access)’.
4. Selecting a role for an individual will add that person to the relevant distribution list, and will ensure their access to relevant content on the Portal.
5. A person cannot be removed from a Role that they hold by virtue of their appointed office (i.e., you cannot remove a warden from the ‘Warden’ Role). However, you can remove a warden from receiving property or finance related emails by deselecting those Roles.
6. A person must have at least one Role to have access to the portal.

Content on the Parish Portal vs Distribution lists

Most content on the Parish Portal is available to anyone with any level of portal access – only a small portion of information is restricted to viewing by certain Roles. In contrast, emails to distribution lists will only be sent to the people on the relevant list, in order to target those individuals who will value being alerted to updates in information. This allows those who have Portal access to find information they are looking for without signing up for a distribution list.

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How it works

The parish portal operates on the basis that certain parish positions are elected or appointed, and the members who hold those positions require –

1. access to certain information on the parish portal (for example, wardens require access to financial information), and
2. inclusion on distribution lists from the Diocese (for example, safe ministry representatives need to be able to be contacted about changes in Safe Ministry).

Once a parish member is appointed to a position, they will have access to the relevant information held securely on the parish portal. Such appointments are reflected in the **Appointments and Licenses** tab. However, in the **Administration** tab, you may view and assign additional Roles to other members of your parish.

Once someone has a Role in a certain area, either by virtue of the office they hold, or having been assigned that Role, they will have access to relevant content securely provided through the Parish Portal and receive relevant circular emails. This system also allows the Rector and wardens to 'de-select' themselves from certain Roles, so that they are not included on circulars in which they have no interest.

In the case of financial and property matters, rectors and wardens can choose whether or not to receive financial circulars or property circulars but will always have access to the financial and property content on the portal.

It is our objective through this process that parishes are given a great deal of flexibility and control over the communications they receive from SDS.

People that you can assign roles to - Adding a new user

The Parish Portal contains information on your parish office holders and clergy. Once a person is in the system associated with your parish, you should be able to assign that person additional responsibilities.

If there are people who are not display in the Administration tab for your parish, to whom you would like to assign responsibilities, you will need to complete an online form (available from the same page - **ADD ACCESS FOR A PERSON NOT LISTED BELOW**) to establish that person in our system. Once verified with Registry, that person will be sent an invitation to logon and update their details, at which point they will become visible in your administration tab.