


OPAS PARISH DATABASE
(PARISH DB)
PARISH ADMINISTRATORS
GUIDE



Introduction

Welcome to OPAS Parish Database!

We hope that you will find the system easy to use and of course helpful.

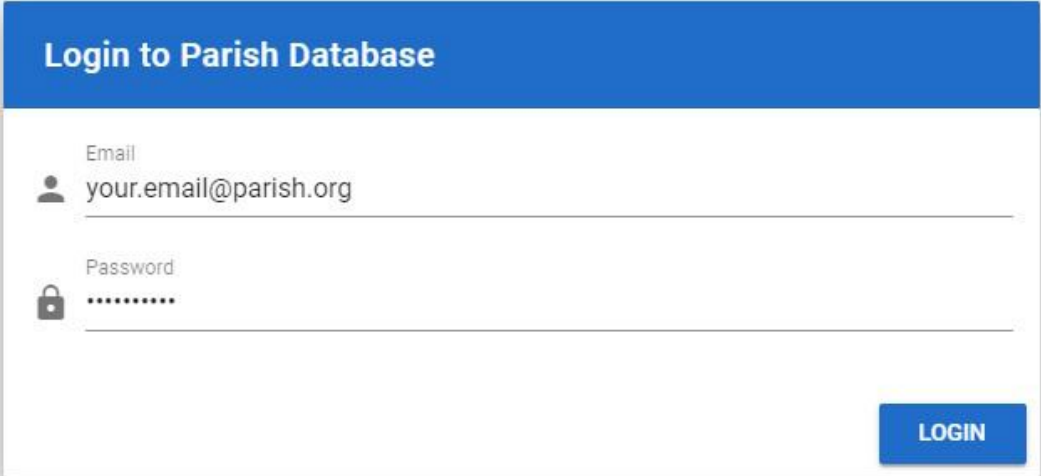
Like with OPAS accounts and Gift Aid, this system is owned by the Catholic Church and will be developed for use by it for the future.

Please let us know via your parish administrator and/or diocese if you have any problems or would like to make a suggestion as to how the system can be improved for the benefit of all.

Now to the boring but IMPORTANT bit!

OPAS Parish Database contains personal data as governed by data protection law, please bear this important responsibility in mind when accessing the system, extracting information from it and who then has access to that information.

Logging In



Login to Parish Database

Email
your.email@parish.org

Password
.....

LOGIN

To use the Parish Database, you will first need to log in. You should have been supplied with your credentials by your Diocesan database administrator. These are your email address and a password.

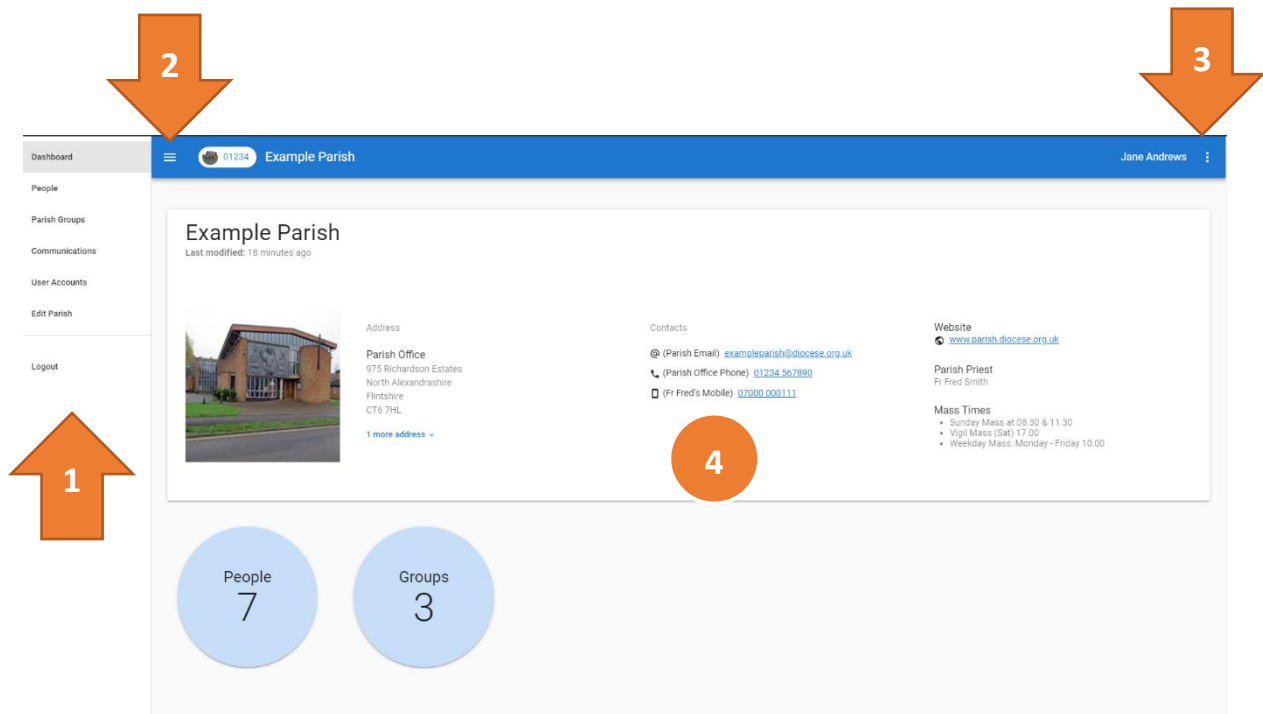
If you have difficulties logging in, please contact:

Your Diocesan database administrator.

DO NOT DIVULGE YOUR PASSWORD to anybody else, even your Diocesan administrator and do NOT allow your internet browser software to remember or save your password.

If your login details have been compromised, tell your Diocesan administrator and/or your Diocesan data protection officer/manager immediately – i.e. follow your Diocesan data protection procedures for a potential data breach.

The Application Layout

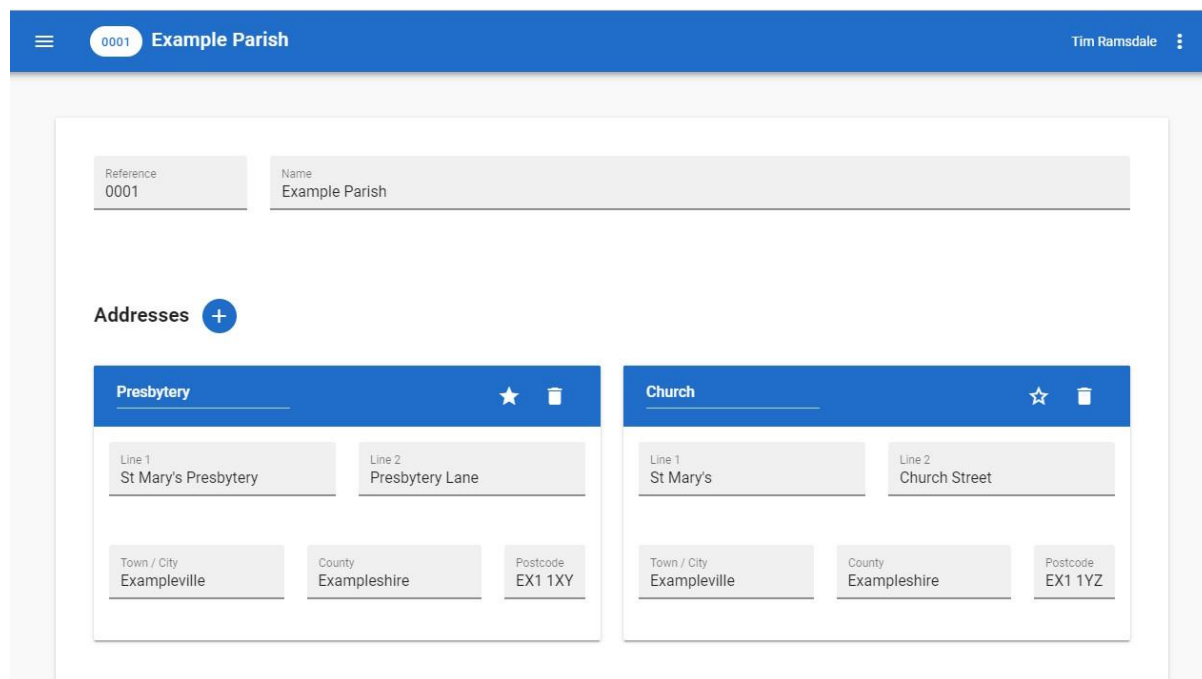


1. This is the application main menu. You use these to get to various sections and pages within the Parish Database.
2. The “hamburger” ☰ allows you to collapse and expand the side menu.
3. The 3 vertical dots ⋮ open a menu that lets you:
 - a. Edit your profile (change your email, password, etc.)
 - b. Log out of the application.
4. This is the main application area.


Editing Parishes



You can edit your parish details by clicking the  Edit Parish menu item.

Addresses





Reference: 0001, Name: Example Parish

Addresses 

Presbytery  



Line 1: St Mary's Presbytery, Line 2: Presbytery Lane

Town / City: Exampleville, County: Exampleshire, Postcode: EX1 1XY

Church  

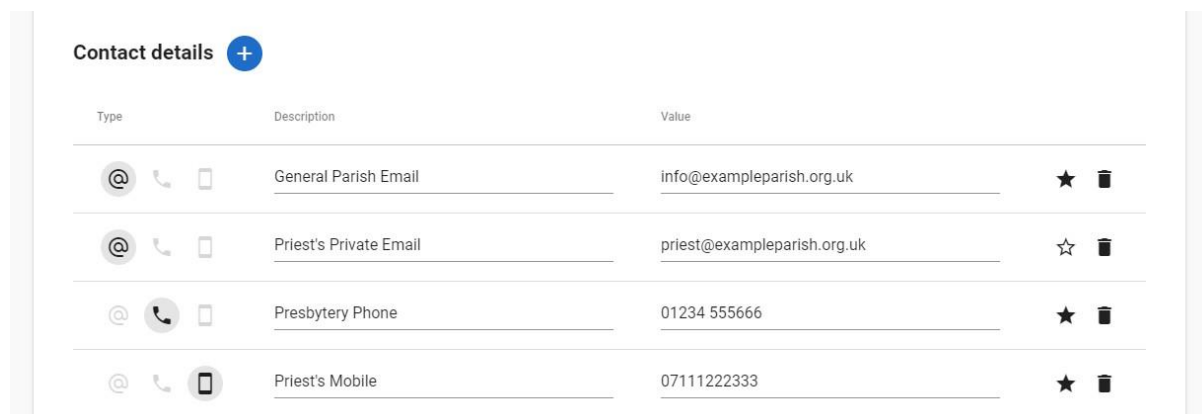
Line 1: St Mary's, Line 2: Church Street


Town / City: Exampleville, County: Exampleshire, Postcode: EX1 1YZ





















Click the  plus icon to add one or more addresses to your parish. For example, you may want to note your church address and the parish office address separately. You can add as many addresses as you need, but you should designate one address as the “primary address” by clicking the  icon. You can also enter a short description of each address by clicking and typing in the blue banner/bar above each address.


To remove an address, simply click on the  delete icon.

Contact Details



Contact details 

Type	Description	Value	
  	General Parish Email	info@exampleparish.org.uk	 
  	Priest's Private Email	priest@exampleparish.org.uk	 
  	Presbytery Phone	01234 555666	 
  	Priest's Mobile	07111222333	 

Click the  plus icon to add one or more contact details to your parish. Contact details are one of three possible types:  Email Addresses,  Land Telephones and  Mobile Phones

You can add as many contact details as you need, but you should designate one entry of each type as the “primary contact” by clicking the ☆ icon.

For each contact detail, you can add a short description. This will make it easier to distinguish between multiple email addresses, phone numbers, etc.

To remove a contact detail, simply click on the 🗑 delete icon.

Parish Details

The screenshot shows a form titled "Parish Details" with several input fields and sections:

- Website:** A text input field containing "http://www.exampleparish.org.uk" with a globe icon to its right.
- Priest name:** A text input field containing "Father John Smith".
- Notes:** A large, empty text area for adding notes.
- Mass Times:** A text input field with a blue border. Below it is a dropdown menu with the text "Choose from the available options or enter a new option and press enter" and a small "enter" button.
- Picture:** A section with a dashed border containing the text "Drag an image or click here to select a file".

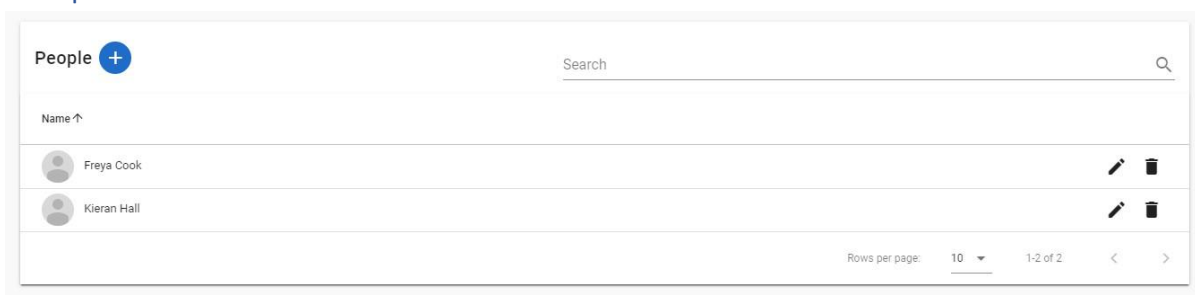
You can add more detail to the parish record by entering the website address, the Parish Priest’s name and you can add any notes.


You can also record the parish Mass Times. To do this start typing in the Mass Times textbox and press the Enter key after each mass time. Parish DB will try to suggest common mass times as you are typing. You should choose the suggestion if it is relevant, or you can continue to create a new mass time.




You can also add a picture if you wish.

Don't forget to save any changes by clicking
the Save button at the bottom of the screen!

People



You can list people by choosing  People in the main menu. If you have lots of people, you can search for the person you want using the search tool at the top right of the page, and you can change the number of people displayed using the Rows per page options at the bottom right of the page.

Click the  icon to add a new person. Click the  icon to edit a person and click the  icon to delete a person.

Adding and Editing People



This information is what you can record against each person. Apart from their name, they are all optional:

- Title
- Forename
- Middle names
- Last name
- Date of Birth – click to choose the Year, Month and Day from the dropdowns
- Country of origin
- Occupation or school
- External Organisations (linked to) – This field is used to record other organisations (non-parish) that the person is associated with. As you type, the application may suggest organisations, and you should choose the suggestion if it appropriate. Alternatively, finish typing and press enter.
- Contact details and addresses. These operate exactly like the Parish Contact details and Addresses. Please see Your Parish section for detailed instructions.
- Sacraments – Baptised (with place and date of baptism if you choose Yes), 1st Holy Communion, Confirmation and Marriage.
- Parish Details – Year person arrived in the parish, the Mass attended (those they normally attend), and skills useful to the parish. These last two fields will offer suggestions as you complete them.
- Housebound – if the person is housebound, you will be able to record whether they receive Holy Communion regularly and the persons who bring Holy Communion (possible suggestions may also be offered).
- Picture

Don't forget to Save!

Importing people from OPAS Gift Aid

Parish administrators can also import people directly from OPAS Gift Aid.

Click on  People in the main menu. Click on the  icon and the application will show you a list of parishioners on OPAS Gift Aid. Note: people already imported will not be listed in this screen.

Click on the checkbox next to each person you wish to import and then click the Import button at the bottom of the page. To select everyone, you can click the checkbox at the top of the list. You must select at least one person to enable the Import button.

PLEASE CHECK THE LIST CAREFULLY before importing as sometimes donor records may be duplicated and if input errors occurred in OPAS Gift Aid it's possible that you may see donors that are not or are no longer associated with your parish. To unselect a donor, click the tick next to their name to remove them from the import.



Only information held in OPAS Gift Aid will be imported.


PLEASE NOTE – OPAS Gift Aid and the database do NOT synchronise data – i.e. if you change a record, delete a record or add a new person in either system the other system will also need to be updated. It is important therefore if different users are using the 2 systems they communicate with each other.

If you add a new donor to OPAS Gift Aid, you can then follow the import procedure in OPAS database to copy them across to the database (but not vice versa).

The import routine has a checking facility built in which means that only donor records which have not already been imported will be displayed. Caution is advised here because it is possible that a person may have been added in to the database some time before they become a Gift Aid donor, it would be wise to check this before considering an import – really this facility once the initial download has been done should probably only be used for new Gift Aid donors who are new to the parish at the same time.

Importing People from Excel

You can import people from Excel. Click on  People in the main menu. Click the  icon and follow the instruction to download the import file template which contains detailed guidance on

how to format your data. Save your data in the file and click the  icon to upload your data. **ONLY** correctly formatted data will be imported. If you already have people in the parish, you may need to check for duplicates.

Parish Groups

Name ↑	Description	Members	
Choir	The Parish Choir	-	
Cleaners <small>global</small>		-	
Employees <small>global</small>		1	
Eucharistic Ministers <small>global</small>		-	

Rows per page: 10 1-4 of 4

You can list groups by choosing Parish Groups in the main menu. If you have lots of groups, you can search for the group you want using the search tool, and you can change the number of groups displayed using the Rows per page options.

You can also order the list by clicking on the Name, Description, or Members headers.

Click the icon to add a new group. Click the icon to edit a group and click the icon to delete a group.

Adding and Editing Groups

When adding a group, you must enter a group name, and you can also add a description if you wish.

Don't forget to click the Save button!

Adding People to a Group (Members)

Click the Members tab in the blue header bar to list and add new people to the group you are creating or editing.

GROUP DETAILS MEMBERS

Find a person

Freya Cook

Kieran Hall

SAVE CANCEL

Click the Find a person text box, and then choose the person you wish to add to the group. As you type, the application will narrow the list of people, making it easier to find who you wish.

You can enter the Role of the person in the group if applicable – e.g. music leader.







Click the icon to remove a person from the group. This will NOT delete the person but will only remove them from the group!

Note: You can also add people to groups by editing their record in the People section by clicking the Parish Groups tab in the blue header bar. Here the process is reversed, so instead of search for a person to add to the group, you search for the group to which you want to add the person.

Permissions

Permissions are the rules that determine what Users can and cannot do. The way Parish DB works is that you first create a set of permissions, and then allocate that set of permissions to a user or set of users.

Parish DB is set up so that depending on what permissions are given to Users, they are able to do different things in each section of the site:

Section	Capability
Users	 List
People	 See details
Groups (all groups, or just specific groups)	 Assign (only applicable to groups)
	 Edit
	 Create
	 Delete

Permissions are grouped together to create what are called a “Permission Set”. When creating a Permission Set, you allocate what capabilities are granted within each section.

So, for example, you might give a User no capabilities within the User section, “See details” capabilities within the People section, and “Assign” capabilities within the Groups section.

By granting this set of permissions to a User:

- they wouldn’t be able to see any user information at all
- they would be able to see the list of people and would be able to click on a person and see their details, but wouldn’t be able to edit, create or delete people
- they would be able to see the list of groups and their members, and can allocate people to groups, but won’t be able to add, edit or delete groups

So, it is by creating these permission sets and assigning them to users, that you can control who can do what on Parish DB.



We recommend that you familiarise yourself with this section, and maybe ask us for assistance before creating any additional users.

Parish Admin





You can assign certain users to be “Parish Admins”. These people have a full set of permissions that allow them to edit all information in all sections within their parish. Please see the Users section below on how to make (and un-make) users Parish Admins.

Users

Note, Users are not People. Users have permission to log into the application. Should you wish to add someone as a User who already exists in Parish DB as a person, you will need to create them as a User as well.

Click  User Accounts in the main menu and click the  icon to add a new user.

User Details

Forename	Last name
E-mail 	Confirm E-mail 
Password  <small>Password is required</small>	Confirm password 

Permissions


Parish Admin

Choose permission sets 

Complete the user details and press save when finished.

The password rules are:

Must have a minimum of 10 characters, at least one uppercase letter, one lowercase letter, one number and one special character (#?!@\$%^&*-'""()[]).

You can click on the  icon to show the password you are typing.

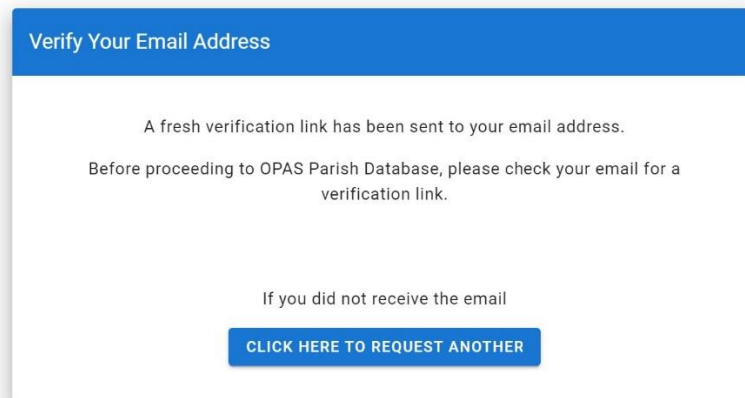
If you wish the user to have Parish Admin permissions, click the Parish Admin switch (It turns blue). The user will have full permissions for this parish.

Alternatively, you can assign one or more permission sets to this user. Choose them from the dropdown. To the right of this dropdown, you will see the full list of permissions assigned to this user based upon the sets you have chosen.


Don't forget to click the Save button!

When creating a new user, or when editing an existing user's email address, the email will need to be verified by the user. They will receive an email after they next attempt to log in containing an email verification link which they must click.

The verification link is only valid for **one hour**. Should any user require a new link, they can use the button provided on the popup to request a new verification email.



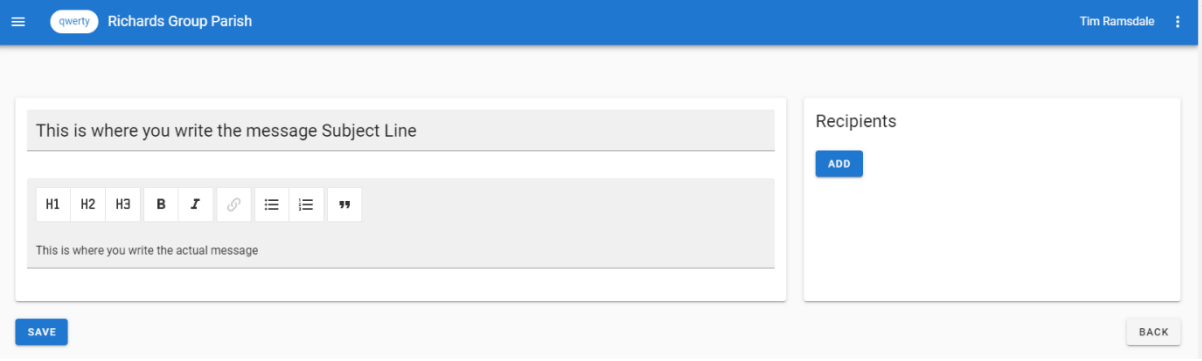
Communications

You can access the communications section by choosing the  Communications section on the main menu.

The communications page has two tabs:

- Drafts – this is where draft messages that haven't yet been sent are listed, and can be edited, deleted or actually sent
- Sent – this is where an archive of sent messages are listed and can be viewed





To create a new message, click the  icon.



The screenshot shows a web interface for creating a message. At the top, there is a blue header with a hamburger menu icon, the text 'qwerty Richards Group Parish', and the name 'Tim Ramsdale' with a three-dot menu icon. Below the header is a form with two main sections. The left section is for writing the message, with a text input field for the 'Subject Line' and a rich text editor for the 'actual message'. The rich text editor has a toolbar with icons for H1, H2, H3, bold (B), italic (I), link, bulleted list, numbered list, and citation. The right section is titled 'Recipients' and contains an 'ADD' button. At the bottom of the form, there are 'SAVE' and 'BACK' buttons.

There are specific areas on the page for you to write the message subject line, and to create the body of the message (see above).

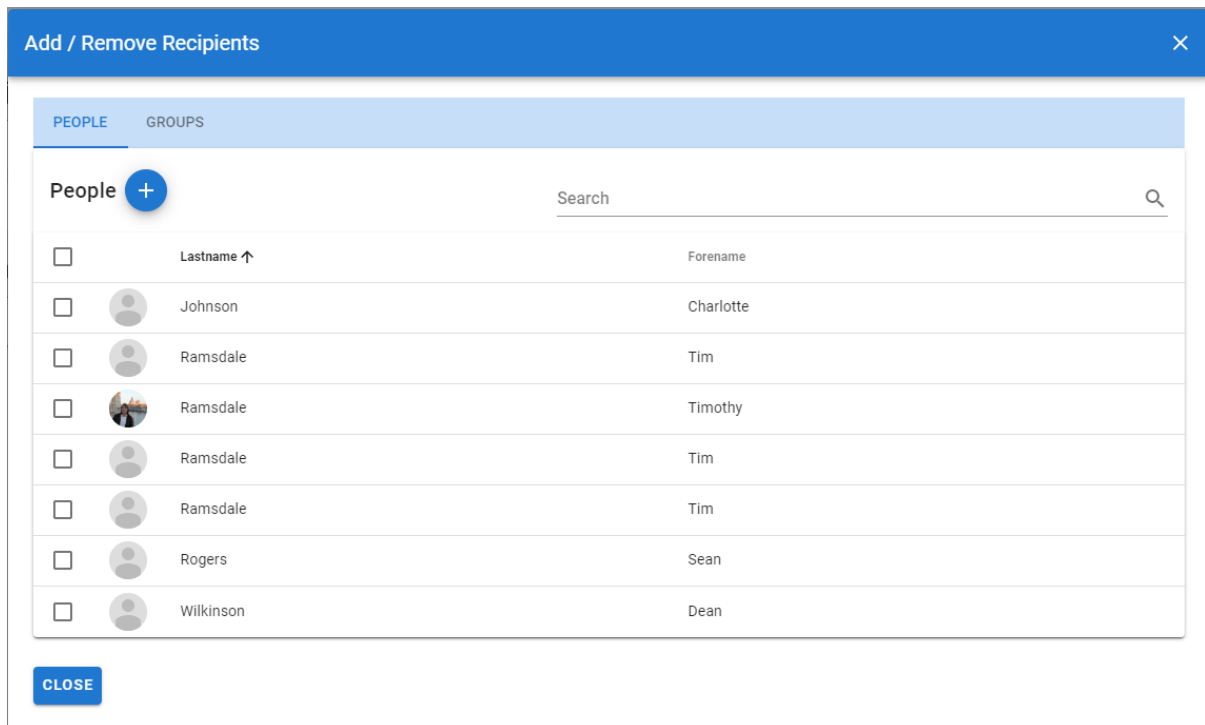
You can format the message using the toolbar above the message area:

- **H1** = primary heading
- **H2** = secondary heading
- **H3** = sub-heading
- **B** = bold
- **I** = italic
-  = turn highlighted text into a link to a website
-  = bulleted list
-  = numbered list
-  = citation

Once you have created your message you can save it and return to it later to edit it and to add recipients.

You can add attachments by clicking on the “Attachments ” icon.

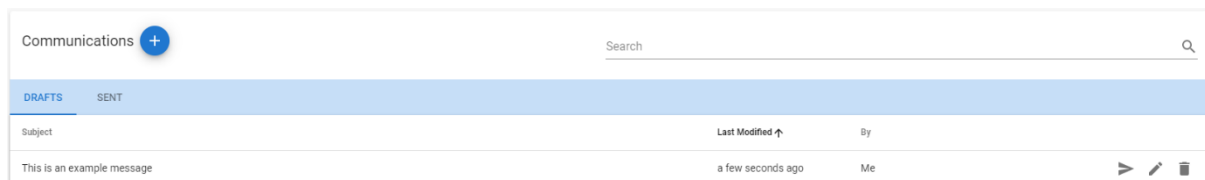
To add recipients, click on the Add button in the Recipients area. A page will pop-up allowing you to choose recipients individually, or to select all the people within a specific group, or selection of groups. You can use the checkboxes to select multiple people/groups. You can also click the checkbox at the top of the list to select all in the list (click again to unselect all).






You can select as many people or groups as you wish, and these will be listed in the Recipients area of the main message editing page. When selecting people and/or groups, you can flip between each list using the tabs in the Add Recipient pop-up.


Once you have added your list of recipients, don't forget to click on the Save button to save your updated message!

Your message will now be listed in the Drafts section of the main Communications page.




Until you actually send the message, you can return to it to edit it and its recipients by clicking on the  icon, and you can delete any unwanted drafts by clicking on the  icon.

When you are ready to send the message, you simply click on the  icon, and confirm your intention in the pop-up confirmation. You should then wait whilst the message is being sent, and you will see a progress bar indicating that the message is being emailed.

Once your message has been sent, it will be removed from the Drafts list, and will now be in the Sent list, where you can view it. If by chance you aborted the send message routine whilst it was running, so that perhaps not all recipients received it, you can continue sending the message from the Sent list by clicking on the  icon. The icon will not be present if the message was sent successfully to all intended recipients.

Editing the email signature

You can edit the “signature” on the email sent on all communications by your parish. The signature is what appears below the main email body, and usually contains information about key contacts and confidentiality.

Select  Edit Parish on the main menu, and then select the Communications tab.



The screenshot shows the 'COMMUNICATIONS' tab in the Parish Database interface. At the top, there are tabs for 'PARISH DETAILS' and 'COMMUNICATIONS'. Below the tabs is a rich text editor with a toolbar containing icons for H1, H2, H3, Bold (B), Italic (I), Link, Bulleted List, Numbered List, and Quote. The editor contains the following text:

Confidentiality

Don't even think of sharing this.

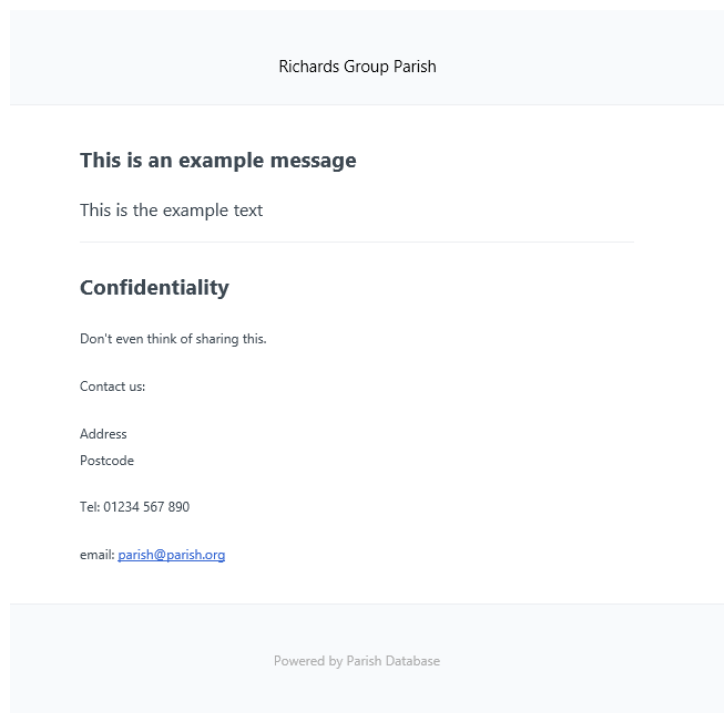
You can contact us at the Parish Offices:

Address
Postcode
Tel: 01234 567890
Email: parish@parish.org

At the bottom of the editor, there are 'SAVE' and 'CANCEL' buttons.

Do not forget to click the Save button!

This is what an example email message might look like to the recipient.



The example email message is displayed within a light blue header box that reads 'Richards Group Parish'. Below the header, the message content is as follows:

This is an example message

This is the example text

Confidentiality

Don't even think of sharing this.

Contact us:

Address
Postcode
Tel: 01234 567 890
email: parish@parish.org

The message concludes with a light blue footer box that reads 'Powered by Parish Database'.

You will notice the “signature” appears below the main message body.

You can also set the default “reply to” email address (the email address that responses to communications go to by default).