



Process ID	PSF-005
Process Name	Contact Updates, Additions, and Deactivations in My Archmil

Purpose: Access names and contact information from the Archdiocese of Milwaukee database and edit contacts.

Participants:

Job Title	Role
Various	Those in leadership roles at parishes.

Software and/or System Access Required:

	Software / System	Purpose	Location (i.e., file path, web address, etc.)	Access Level
1	Archdiocese of Milwaukee Names Database	Entry point for accessing contacts across the Archdiocese	Archdiocese of Milwaukee - Admin Names (archmil.org)	Edit permissions for Parish and/or School

Process Steps:

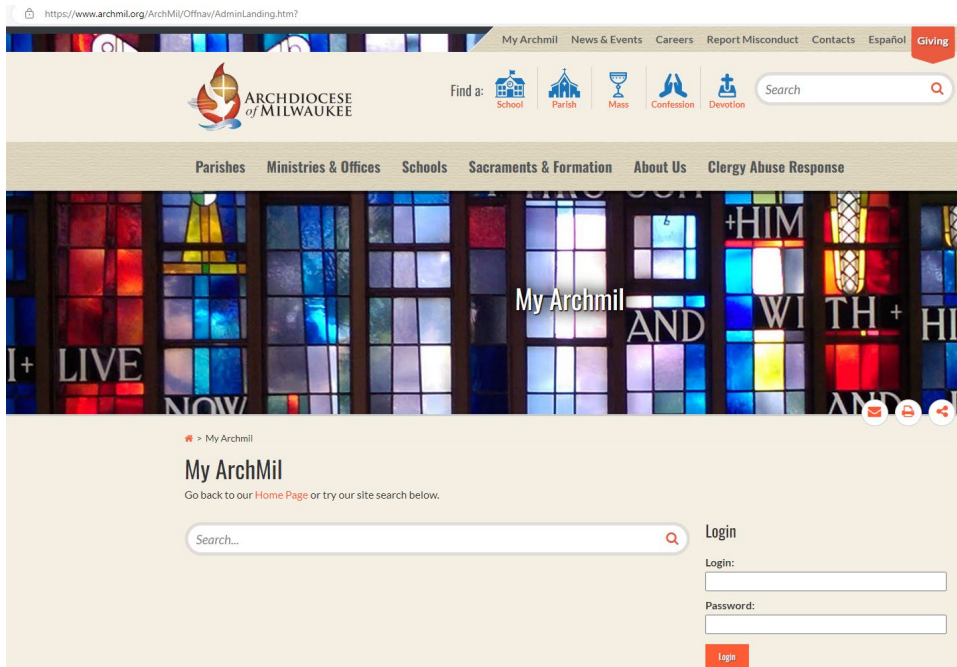
- 1) From the [Archdiocese of Milwaukee \(archmil.org\)](http://www.archmil.org) website, click on “My Archmil” in the top ribbon.



PSF-005 Contact Changes in My Archmil

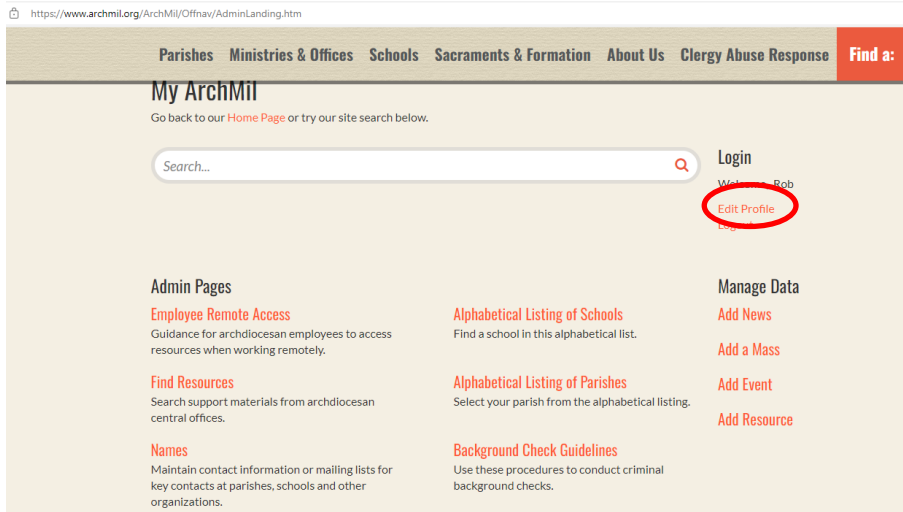
2) Log into “MyArchmil” website.

Note: If you do not have a login with a password, find out if someone at your parish/school already manages contacts on the MyArchmil website. If so, please ask that person to grant you editing rights and to set up a password for you. If no one at your parish/school is currently managing your parish’s or school’s contacts, please email parishfinance@archmil.org. Include the parish or school three digit code, parish/school name, city, and your name.



PSF-005 Contact Changes in My Archmil

3) To edit yourself, click on “Edit Profile” on the right hand side of the screen.

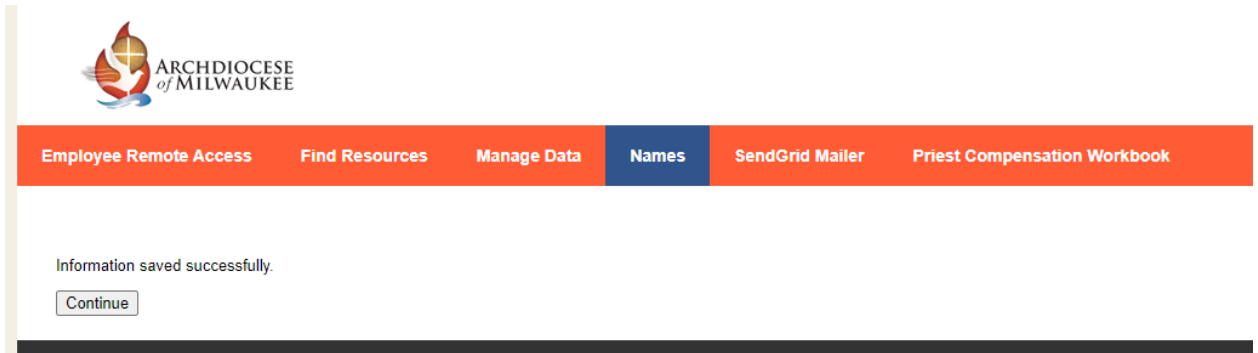


The Edit Name file should appear. Update information and click “Save & Continue” button.

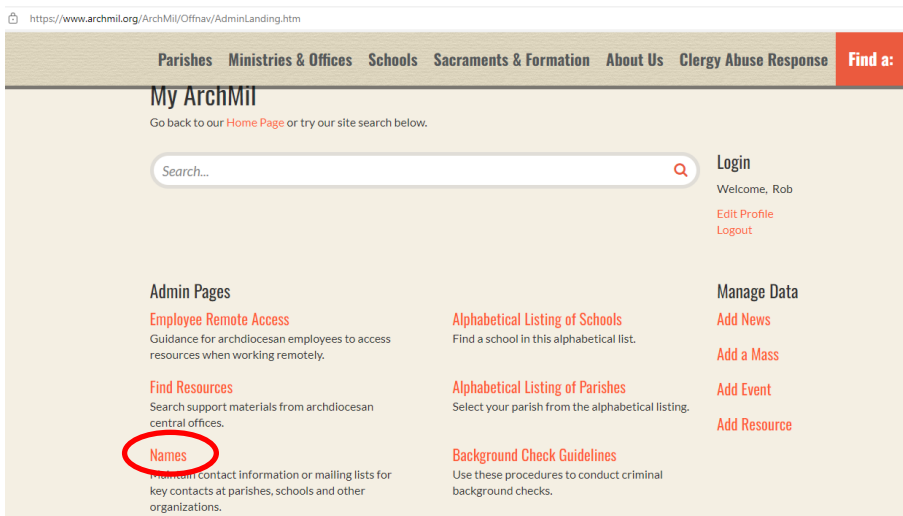
The screenshot shows the 'Edit Name' form in the My ArchMil system. At the top, there is a logo for the Archdiocese of Milwaukee and a navigation bar with links for Employee Remote Access, Find Resources, Manage Data, Names, SendGrid Mailer, and Priest Compensation Workbook. The 'Names' link is highlighted. Below the navigation bar, the form title is 'Edit Name' with a list of instructions: 'Do not use the Back button at any time during the editing process', 'Complete as much Contact information as possible', and 'Assign the appropriate Tags and User Security settings'. The form is divided into two sections: 'Identification Information' and 'Contact Information'. The 'Identification Information' section includes fields for Prefix, FirstName (Rob), MI, Last Name (Kratoska), Suffix, Organization (Archdiocese of Milwaukee), and Position (Director of Parish & School F). The 'Contact Information' section includes fields for Home Contact: Address 1, Address 2, City, State/Zip (WI), County (Select County), Email (kratoskar@archmil.org), Phone, Ext., and Fax. At the bottom of the form, there are 'Save & Continue' and 'Cancel' buttons.

PSF-005 Contact Changes in My Archmil

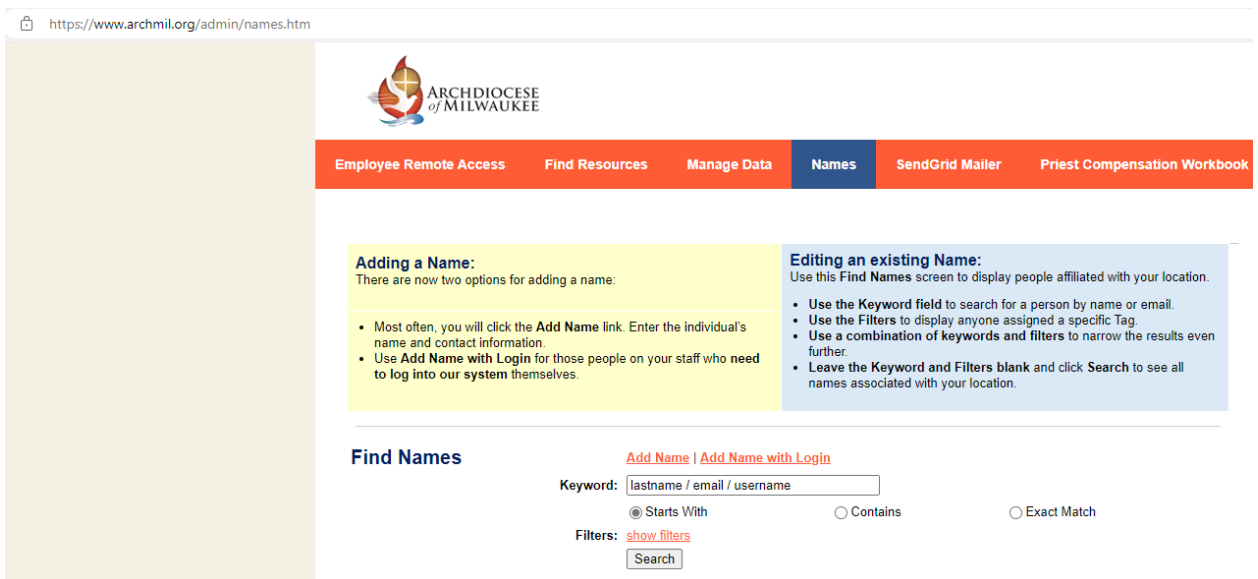
A message should appear indicating a successful save. Click “Continue” button.



4) To edit someone else, click on “Names” from the options.



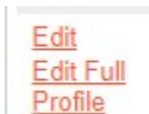
The window should open to the “Names” view:



PSF-005 Contact Changes in My Archmil

From this page, you may:


- a) Find and edit an existing person in MyArchmil (see instructions below).
 - b) Add a new name (without login rights)
 - i. Commonly for parish/school volunteers, council members, trustees, etc. The parish is responsible to maintain this information.
 - ii. The editor sets the tags (see instructions below for editing an existing person), which sets up this name for email communications.
 - c) Add a new name (with login rights)
 - i. Commonly used for parish/school employees who are responsible for logging in periodically to update their home contact information.
 - ii. The editor may set a temporary password and share it with the employee. The employee will have option to change the password when he or she first logs in.
 - iii. The editor sets the tags (see instructions below for editing an existing person), which sets up this name for email communications.
 - iv. The editor can grant this person editor access under User Security.
- 5) If you are editing an existing person in the MyArchmil system:
- a) Enter the name of the person to be updated in the “Keyword” box.
Note: *The search function may be finicky. Enter in only a last name or only a first name (if an unusual first name).*
 - b) Click “Search” button. The window will populate with all entries that match this search.
Note: *If many results are found, you may need to scroll through the names to find the correct person.*
 - c) Locate the person you are seeking and click “Edit Full Profile” to the left of the person’s name:



Edit
Edit Full
Profile

PSF-005 Contact Changes in My Archmil

d) Fill in as much of the person's contact information as is available.



ARCHDIOCESE
of MILWAUKEE

Employee Remote Access Find Resources Manage Data **Names** SendGrid Mailer

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

Login Information

Username:

Password:

Password Confirmation:

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) Set email and mail preferences:

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

PSF-005 Contact Changes in My Archmil

f) Classify the user

i) Select “Tags.”

Common selections are shown below to help navigate to the options desired.

Note: Job titles for parish employees and for school employees are in separate “Tags” areas.

Note: Clergy and parish directors may only be updated by the Chancery Office.

Role	Tags	Options
	County	<<Select County Name>>
All Parish People	Parish	<<Select Parish Name>>
All School People	School	<<Select School Name>>
Parish Finance/HR Staff	Parish Groups	Bookkeeper Business Managers/Dir. of Admin. Services
	Finance	Participants Indemnity Plan
Parish Trustee	Parish Groups	Parish Trustee
Parish Finance Council Members	Parish Finance Council	<i>(there are more options, these are a selection)</i> Chair Pastoral Council Representative Budget Committee Chair Building & Grounds Committee Chair Parish Cemetery Committee Chair Personnel Committee Chair Appointed Member
Parish Pastoral Council Members	Parish Pastoral Council	<i>(there are more options, these are a selection)</i> Chair Secretary Member at Large Christian Formation Chair Human Concerns Chair Prayer & Worship/Liturgy Chair School Advisory Committee/Chair Stewardship Chair Youth Representatives
Deanery Representative	Parish Groups	Deanery APC Members Deanery Parish Representative

PSF-005 Contact Changes in My Archmil

Role	Tags	Options
Parish Finance/HR Staff	Parish Groups	Bookkeeper Business Managers/Dir. of Admin. Services
	HR Positions	Benefit Coordinators
	Finance	Participants Indemnity Plan
Other Parish Employees	Religious Ed	Catechist Religious Ed/Youth Ministry Administrator Spanish Language Coordinators
	SAPRS	Safe Environment Coordinators
	Liturgy and Music	Liturgists Musicians RCIA – Director RCIA Team Member
	Communications	Schools Marketing Leaders
	Parish Groups	<i>(there are more options, these are a selection)</i> Bulletin Editor Communications Contact Development Director Evangelization Contact Maintenance Directors Parish Activities/Communication Committ Chair Parish Staff – Lay Members Parish Web Administrators Secretary / Admin Assistant Stewardship Contact

PSF-005 Contact Changes in My Archmil

Role	Tags	Options
School Employees	School Groups	<i>(there are more options, these are a selection)</i> Assistant Principal Business Manager Elementary Principal Elementary School Guidance Counselor Elementary Teacher High School Campus Minister High School Guidance Counselor High School Principal High School Teacher Librarian School Choice Contact School Committee/Board Chairperson School Committee/Board Member School Nurse School Staff School Volunteer School Web Administrator Secretary / Admin Assistant Technology Coordinator


ii) Once a tag is selected, the box to the right will auto-populate with the options for that tag, as shown in the table above.

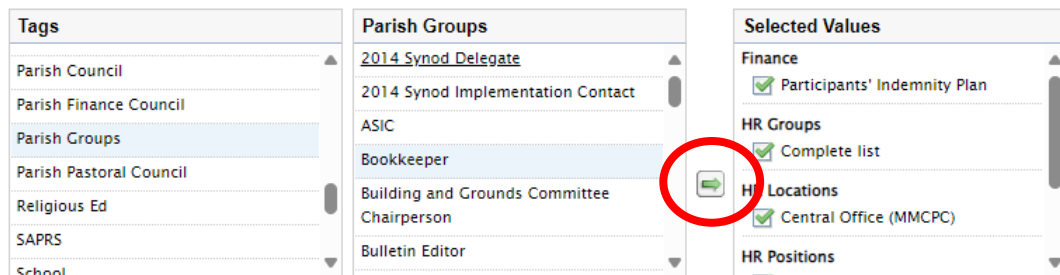
(1) Select the option desired in the middle box.

(2) Use the green arrow button to move the selected value to the third box.

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.



iii) Repeat for other desired contacts.

PSF-005 Contact Changes in My Archmil

- g) Set user security. Determine if the person should have access to edit others for either the school or the parish.

Note: This option is only available if the person has login access.

Note: Typically, a parish or school should have two people with edit access. These are the only two individuals who would have passwords to log into MyArchmil and have access to change other people's profiles.

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

- h) Set Permissions. This could vary, but for most parish employees, select the "Role" under the Permissions box, then move the appropriate role(s) to the Selected Values box.

Note: Permissions may grant access to "locked" sections of the Archmil.org website. For example, only individuals with "Business Managers/Dir. of Admin. Services" may access pages with financial reporting tools.

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	Role	Selected Values
Groups	Parish - Bookkeeper	Groups
Additional Permissions	Parish - Secretary/Admin. Assistant	<input checked="" type="checkbox"/> Editor - Names
Role	Parish - Staff	Role
	Parish Stewardship	<input checked="" type="checkbox"/> Business Managers/Dir. of Admin. Services
	Religious Ed - Religious Ed/Youth Ministry Administrator	
	Religious Ed - Secretary	

- i) Click "Save & Continue" button.

A message should appear indicating a successful save. Click "Continue" button.

The screenshot shows the top navigation bar of the Archdiocese of Milwaukee website with the following links: Employee Remote Access, Find Resources, Manage Data, Names (highlighted), SendGrid Mailer, and Priest Compensation Workbook. Below the navigation bar, a message states "Information saved successfully." and a "Continue" button is visible.

Appendix A: Deactivating a User

Deactivating a User

Parishes and schools should update user profiles whenever an employee starts or terminates employment with the parish or school.

Parish volunteers should be updated at least once per year. As trustees and council members typically rotate on and off effective as of July 1st each year, this would be an ideal time to update contacts.

Keep in mind that some users may have multiple roles, sometimes at more than one parish. If an individual has multiple roles, instead of deactivating the person, simply edit the tags to remove areas that are no longer valid.

To deactivate an existing individual, follow steps 1 through 5c above.

When the profile appears, deselect the “Is Active” checkbox, found just above the “Login Information.”

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

Login Information

After deselecting the checkbox, click the “Save & Continue” button at the bottom of the page.

Appendix B: Filtering for All Names Assigned to a Parish

Filtering All Names Assigned to a Parish

This is a way to produce a list of names of people who are currently assigned to a parish. Running this list may be handy when trying to determine if there are duplicate entries, names that should be deactivated, missing names, etc.

- 1) Starting from the Names screen (step 4 above), click “show filters.”

Find Names

[Add Name](#) | [Add Name with Login](#)

Keyword:

Starts With Contains Exact Match

Filters: [show filters](#)

- 2) Once clicked, the filters will expand on the screen. In the “Tags” box, scroll to “Parish.”

Find Names

[Add Name](#) | [Add Name with Login](#)

Keyword:

Starts With Contains Exact Match

Filters: [hide filters](#)

Tags	Available Values	Selected Values
Asian Ministry		
Bereavement Ministry		
Black & African Ministry		
Chancery Groups		
Communications		
County		
Deaf/Hard of Hearing		

Permissions	Available Values	Selected Values
Groups		
Additional Permissions		
Role		

- 3) In the Tags box, select “Parish.” The middle box will populate with parish options.

PSF-005 Contact Changes in My Archmil

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

Keyword:

Starts With

Contains

Exact Match

Filters: [hide filters](#)

Tags	Parish	Selected Values
Misc Groups	St. Bernadette - Milwaukee (E03)	
Native American Ministry	St. Bernard - Wauwatosa (E19)	
Newsletters	Blessed Sacrament - Milwaukee (G09)	
Parish	Blessed Savior - Milwaukee (E25)	
Parish Council	Blessed Trinity - Sheboygan Falls (J21)	
Parish Finance Council	St. Boniface - Germantown (L04)	
Parish Groups	St. Bruno - Dousman (M06)	

4) Select the desired parish and click the green arrow to move the parish name to the “Selected Values” box.

5) Click the “Search” button at the bottom of the screen.

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

Keyword:

Starts With

Contains

Exact Match

Filters: [hide filters](#)

Tags	Parish	Selected Values
Misc Groups	(D04)	Parish
Native American Ministry	St. Bernard - Wauwatosa (E19)	<input checked="" type="checkbox"/> St. Bernadette - Milwaukee (E03)
Newsletters	Blessed Sacrament - Milwaukee (G09)	
Parish	Blessed Savior - Milwaukee (E25)	
Parish Council	Blessed Trinity - Sheboygan Falls (J21)	
Parish Finance Council	St. Boniface - Germantown (L04)	
Parish Groups	St. Bruno - Dousman (M06)	

Permissions	Available Values	Selected Values
Groups		
Additional Permissions		
Role		

6) After clicking “Search,” scroll down. The responses will be below the filter boxes on your screen.

Version Control

	Version #	Date	Changes Implemented
1	1.0	5/8/24	Initial documentation
2	1.1	10/17/24	Additions for users outside of Archdiocese made.
3	1.2	10/18/24	Additions of Appendices A (Deactivations) and B (Filtering)
4			