

# Roster Editing Instructions

## SR Leadership (Regional & Up)

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# Logging into the Online Roster System

- Go to the [teamssofarlady.org](http://teamssofarlady.org) website
- Select Member Login at the top of the page

## *If you know your email address & password*

- Enter your email & Password
- Click Submit button

## *If you do not know your password*

- Select the link to reset your password
- Follow the instructions to reset password

## **Then**

- Enter your email & Temporary Password
- Click Submit button
- Enter a new password and security question
- Click Submit button

## *If you get an error message stating, "The login you entered does not match our records"*

- Contact one of the following: [Secretariat](#) or [Webmaster](#)

## Standard Data Entry Nomenclature

### Addresses

1. Do not use periods for abbreviations.
2. Common Abbreviations

USE	FOR
St	Street
Ave	Avenue
Cir	Circle
Pl	Place
Rd	Road
Trl	Trail
Ln	Lane
Hwy	Highway
Bld	Boulevard

USE	FOR
Dr	Drive
Wy	Way
Terr	Terrace
PO Box	Post Office Box
E	East
N	North
S	South
W	West

3. Instead of apartment, unit, suite, etc. use #. Example: 12345 W Marks Ave #5 or 678 Market St #1S
4. **Include complete 9-digit zip code.** If you do not know your complete 9-digit zip code (zip + 4), it can be found by entering your address at:  
<https://tools.usps.com/go/ZipLookupAction!input.action>

## Adding Couples

Search and verify that the couple is not already in the system. If not, then: Start with either spouse. If multiple records are found for a member, inform the Secretariat or Webmaster.

- Select Admin tab
- Click on Add Person button

### Select One

- This person is a Contact
- This person is a User (requires email address)

**NOTE: Select "This person is a User" if they have an email, otherwise select "This person is a Contact"**

Enter the following data:

- First Name
- Last Name
- Enter email address if available
- Phone Number(s)

### ADDRESS LIST - Select Home

- Enter the following data:
- Select State from dropdown list
- Address
- City
- Zip code + 4 digit zip

### Group(s) & Person Type(s) - Click ADD button

- Groups:** Select Team Name
- Person Types:** Select Member Active
- Click Save button

### Click on Additional Information Section

- Postal Mail: Select Receive All Mailings (**This should be only selected for 1 spouse**)
- Marital Status: Select appropriate selection
- Salutation Name: i.e. Jorge and Noelia
- Date Joined
- Languages Spoken: Check all that apply

### If this person has an email address: Click on ECONNECTS tab

Under Subscriptions

- Select Email for Magnificat

- Click Submit and Add Related Person

### Select One

- This person is a Contact
- This person is a User (requires email)

**NOTE: Select "This person is a User" if they have an email, otherwise select "This person is a Contact"**

Instructions continue in the right column...

Enter the following data:

- First Name
- Last Name (if different than spouse)
- Enter email address if available
- Phone Number(s)
- Verify Address is correct

### Click on Additional Information Section

- Postal Mail: **No selection for 2nd spouse**
- Marital Status: Select appropriate selection
- Salutation Name: i.e. Jorge and Noelia
- Date Joined
- Languages Spoken: Check all that apply

### If this person has an email address:

#### Click on ECONNECTS tab

Under Subscriptions

- Select Email for Magnificat

- Click Submit button

### Relationship

- For "Is the" select Spouse
- For "Of" verify spouse's name is shown below the data input box
- For "Who is his/her" select Spouse
- Select Soft Donations
- Select Joint or Family Donations
- Select Override Default if necessary and enter both couples name. (Tom and Jane Smith)

- Click Submit

- Review Records

## Adding Spiritual Counselors & Spiritual Advisors

**NOTE:** Search and verify that the member is not already in the system. If multiple records are found for a member, inform the Secretariat or Webmaster.

- Select Admin tab
- Select Add Person button

### Select One

- This person is a Contact
- This person is a User (requires email address)

**NOTE:** Select "This person is a User" if they have an email, otherwise select "This person is a Contact"

Enter the following data:

- Title (Fr., Rev, Deacon, etc.)
- First Name
- Last Name
- Enter email address if available
- Phone Number(s)

### ADDRESS LIST - Select Home

- Enter the following data:
- Select State from dropdown list
- Address
- City
- Zip code + 4 digit zip

### Group(s) & Person Type(s) - Click ADD button

- Groups:** Select Team Name
- Person Types:** Select Spiritual Counselor Active (Priest only)

OR

Select Spiritual Advisor Active (Deacon, Sister, etc.)

- Click Save button

### Click on Additional Information Section

- Postal Mail: Select Receive All Mailings
- Date Joined
- Languages Spoken: Check all that apply

### Click on Group Information Section

- Select Order (if no order select Diocesan Priest)
- Select Suffix
- Select Type

**If this person has an email address:**

### Click on ECONNECTS tab

Under Subscriptions

- Select Email for Magnificat
- Click Submit And View Profile button
- Review Record

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## Deactivating Members

### NOTES

1. Member records are not deleted from the database but the records are changed to maintain Team history.
2. For married members both person records need to be changed.
3. Keep in mind that Spiritual Counselors and Advisors can be on multiple Teams. Use these instructions only if they are no longer on ANY Team. Use the "Editing Special Cases: Removing Spiritual Counselors/Advisors from a Team" instructions to remove them from just 1 of multiple Teams. Also use Editing Special Cases instructions for snowbirds.
4. Use " Editing Special Cases: Documenting a Deceased Member " instructions for deactivating deceased members.

- Select Admin tab
- Locate the member's record
- Click Edit button (pencil)

### Personal Information Section

- My Notifications - Uncheck ALL (emails, notifications, Reminders)

### Click on Additional Information Section

- Postal Mail - Uncheck ALL (Unless member specifically asked to keep receiving Teams mail)
- Deactivated - Enter date member became inactive

**If this person has an email address entered**

### Click on ECONNECTS Tab

- Subscriptions - Uncheck ALL (Unless member specifically asked to keep receiving Teams email)
- Click Submit And View Profile button **Then**
- Click Group (Teams) & Person Types Sub-Tab

### Group(s) & Person Type(s) - Click Edit Button (Pencil)

**Groups:** Select Inactive

**(Do NOT de-select Team Name or any other selected Group)**

**Person Types:**

**For a regular member:**

- De-select Member Active
- Select Member Inactive

**For a Spiritual Counselor/Advisor**

- De-select Spiritual Counselor Active or Spiritual Advisor Active
- Select Spiritual Counselor Inactive or Spiritual Advisor Inactive

**(Do NOT de-select any other Person Types)**

- Click Save button
- Click Submit button
- Review Record

# Editing/Updating Records

## **NOTES**

1. Review the "Editing Special Cases" instructions (pages 6-12) before choosing to use these instructions.
2. For changes in common information for spouses (i.e. address), make the change on both spouse's records.
3. Once a member is a USER they cannot be changed back to a Contact. A USER's email address can be updated, but not deleted.

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### **Under the Personal Information Tab**

- Update contact information as required

### **Click on the Additional Information Section**

- Update information as required

### **Click on the Group Information Section (Spiritual Advisors/Counselors only)**

- Update information as required

### **If this person has an email address**

#### **Click the ECONNECTS Tab**

- Edit subscriptions as required
- Click Submit And View Profile button

### **If the Groups or Person Types need to be edited**

#### **Click the Groups (Teams) & Person Types Sub-Tab**

- Click Edit button (pencil)
- Update information as required
- Click Save button
- Click Submit button

If this record was a "Contact" AND you just added an email address to the profile, THEN do the steps in the box below. If not, just jump to "Review Record" step.

#### **Click the Role Sub-Tab**

- Select Login Enabled
- Click Submit button
- Review Record

## Editing Special Cases: Documenting a Deceased Member

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### Under the Personal Information Tab

- Select: "Is Deceased?"
- If the living spouse will be using the deceased spouse's email, change email to [noemail+X@none.none](mailto:noemail+X@none.none), where X is the deceased spouse's name
- My Notifications - Uncheck ALL (emails, notifications, Reminders)

### Click on the Additional Information Section

- Postal Mail - Uncheck ALL
- Deactivated - Enter date
- Notes - Enter date person passed away

### If this person has an email address entered

#### Click the ECONNECTS Tab

- Subscriptions - Uncheck ALL
- Click "Submit and View Profile" button **Then:**
- Click "Group (Teams) & Person Types" Sub-Tab

### Group(s) & Person Type(s) - Click Edit Button (Pencil)

#### Groups:

- Select Inactive **(Do NOT de-select Team Name)**

#### Person Types:

##### For a regular member:

- De-select Member Active
- Select Member Inactive

##### For a Spiritual Counselor/Advisor

- De-select Spiritual Counselor Active or Spiritual Advisor Active
- Select Spiritual Counselor Inactive or Spiritual Advisor Inactive

- Click Save button
- Click Submit button

- Click the Relationships Sub-Tab

### All The Following Steps Are For The Living Spouse

- Select Admin tab
- Locate living spouse's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### Click on the Additional Information Section

- Notes: Add a note that their spouse is deceased. Be sure to write deceased spouse's name and date of death here for reference.

If the living spouse is leaving Teams perform the steps in the box below.

### Personal Information Section

- My Notifications - Uncheck ALL (emails, notifications, Reminders)

### Click on Additional Information Section

- Postal Mail - Uncheck ALL (Unless member specifically asked to keep receiving Teams mail)
- Deactivated - Enter date member became inactive

### If this person has an email address entered

#### Click on ECONNECTS Tab

- Subscriptions - Uncheck ALL (Unless member specifically asked to keep receiving Teams email)
- Click Submit and View Profile button **Then**
- Click Group (Teams) & Person Types Sub-Tab

### Group(s) & Person Type(s) - Click Edit Button (Pencil)

#### Groups: Select Inactive

**(Do NOT de-select Team Name or any other selected Group)**

#### Person Types:

##### For a regular member:

- De-select Member Active
- Select Member Inactive

##### For a Spiritual Counselor/Advisor

- De-select Spiritual Counselor Active or Spiritual Advisor Active
- Select Spiritual Counselor Inactive or Spiritual Advisor Inactive

**(Do NOT de-select any other Person Types)**

- Click Save button
- Click Submit button
- Review Record

If the living spouse wants to stay in Teams, perform the following steps in the box below.

### Under the Personal Information Tab

- If both names are shown in "First Name" field, remove deceased member's name.
- If the living spouse will be using the deceased spouse's email, copy the email from the deceased spouse

### Click on the Additional Information Section

- Postal Mail - Select "Receive all mailings"
- Marital Status - Select "Widow/Widower"
- Salutation Name: Remove deceased spouse

### If this person has an email address entered

#### Click the ECONNECTS Tab

- Subscriptions - Select Email for Magnificat
- Click Submit and View Profile button
- Review Record

## Editing Special Cases: Removing Spiritual Counselors/Advisors from a Team

### **NOTE**

Only use these instructions if the Spiritual Counselor/Advisor will be active on at least 1 Team after you have made your changes. Otherwise use the "Deactivating Members" instructions.

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### **Click on the Additional Information Section**

- Notes: Provide the date and team the member is leaving.
- Click "Submit and View Profile" button **Then:**
- Click Group (Teams) & Person Types Sub-Tab

### **Group(s) & Person Type(s)**

- Click Edit Button (Pencil) next to the Group & Person Type showing the Team that you want to remove.
- Groups:** De-select only the Team you are removing
- Person Types:** Do nothing here
- Click Save button
  
- Click Submit button
- Review Record

## Editing Special Cases: Adding Spiritual Counselors/Advisors to a Team

### **NOTE**

Only use these instructions if the Spiritual Counselor/Advisor is already on at least 1 Team already. Otherwise use the "Adding Spiritual Counselors & Spiritual Advisors" instructions.

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### **Click on the Additional Information Section**

- Notes: Provide the date and team the member is joining.
- Click Group (Teams) & Person Types Sub-Tab

### **Group(s) & Person Type(s)**

- Click "ADD +" button
- Groups:** Select the Team you are adding.
- Person Types:** Select Spiritual Counselor Active or Spiritual Advisor Active
- Click Save button
  
- Click Submit button
- Review Record

## Editing Special Cases: Removing "Snowbirds" from a Team

### NOTE

Only use these instructions if the couple will be active on at least 1 Team after you have made your changes. Otherwise use the "Deactivating Members" instructions.

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### Click on the Additional Information Section

- Notes: Provide the date and team the member is leaving.
- Click "Submit and View Profile" button **Then:**
- Click Group (Teams) & Person Types Sub-Tab

### Group(s) & Person Type(s)

- Click Edit Button (Pencil) next to the Group & Person Type showing the Team that you want to remove.
- Groups:** De-select only the Team Name you are removing
- Person Types:** Do nothing here
- Click Save button
- Click Submit button
- Repeat all the steps above for the spouse**
- Review Records

## Editing Special Cases: Adding "Snowbirds" to a Team

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### Click on the Additional Information Section

- Notes: Provide the date and team the member is joining.
- Click Group (Teams) & Person Types Sub-Tab

### Group(s) & Person Type(s)

- Click "ADD +" button
- Groups:** Select the Team you are adding.
- Person Types:** Select Member Active
- Click Save button
- Click Submit button
- Repeat all the steps above for the spouse**
- Review Record



## **Editing Special Cases:** **Moving Active Members from One Team to Another Team**

### **NOTE**

If the member(s) is (are) moving to an area outside the area where you have admin privileges, send a request to the Secretariat to make the change to the roster for you.

- Select Admin tab
- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### **Click on the Additional Information Section**

- Notes: Add the left date, old Team name, join date, and new Team name
- Click "Submit and View Profile" button **Then:**
- Click Group (Teams) & Person Types Sub-Tab

### **Group(s) & Person Type(s)**

- Click Edit Button (Pencil) next to the Group & Person Type showing the Team that you want to move them "from".

### **Groups:**

- De-Select their last Team.
- Select the Team they are joining
- Click Save button
  
- Click Submit button
  
- Review Records

## Editing Special Cases: Reactivating Inactive Members

Select Admin tab

- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click View button (blue letter i)
- Click Group (Teams) & Person Types Sub-Tab

### **Group(s) & Person Type(s)**

- Click Edit Button (Pencil)

#### **Groups:**

- De-Select their last Team.
- Select the Team they are joining
- De-Select Inactive

#### **Person Types:**

##### **For a regular member:**

- Select Member Active
- De-Select Member Inactive

##### **For a Spiritual Counselor/Advisor**

- Select Spiritual Counselor Active or Spiritual Advisor Active
- De-Select Spiritual Counselor Inactive or Spiritual Advisor Inactive

**(Do NOT de-select any other Person Types)**

- Click Save button
- Click Submit button

- Click Edit Profile button

### **Under the Personal Information Tab**

- Update contact information as required

### **Click on the Additional Information Section**

- Postal Mail: Select Receive All Mailings **(This should be only selected for 1 spouse)**
- Marital Status: Select appropriate selection
- Salutation Name: i.e. Jorge and Noelia
- Date Joined: Leave original date joined
- Date Deactivated: Remove date
- Notes: Add original deactivation date, old Team name, rejoin date, and new Team name
- Languages Spoken: Check all that apply

### **Click on the Group Information Section (Spiritual Advisors/Counselors only)**

- Update information as required

### **If this person has an email address**

#### **Click the ECONNECTS Tab**

- Select Email for Magnificat

- Click Submit And View Profile button

**Instructions continue in the right column...**

### **Do These Steps to Make This Person a USER (requires email address)**

#### **Click the Role Sub-Tab**

- Select Login Enabled
- Click Submit button

**If a record exists for each spouse, repeat all the prior steps for the other spouse. If there is only one record for both spouses, perform the steps below.**

- Click Submit and Add Related Person

#### **Select One**

- This person is a Contact
- This person is a User (requires email)

**NOTE: Select "This person is a User" if they have an email, otherwise select "This person is a Contact"**

### **Under the Personal Information Tab**

- Update contact information as required

### **Click on the Additional Information Section**

- Postal Mail: **No selection for 2nd spouse**
- Marital Status: Select "Married"
- Salutation Name: i.e. Jorge and Noelia
- Date Joined: Leave original date joined
- Date Deactivated: Leave blank
- Notes: Add original deactivation date, old Team name, rejoin date, and new Team name
- Languages Spoken: Check all that apply

### **If this person has an email address:**

#### **Click on ECONNECTS tab**

Under Subscriptions

- Select Email for Magnificat

- Click Submit button

#### **Relationship**

- For "Is the" select Spouse
- For "Of" verify spouse's name is shown below the data input box
- For "Who is his/her" select Spouse
- Select Soft Donations
- Select Joint or Family Donations
- Select Override Default if necessary and enter both couples name. (Tom and Jane Smith)

- Click Submit

- Review Record(s)

## **Editing Special Cases:** **Creating Individual Records for** **Couples that are on a Single Record**

- Select Admin tab
- Locate member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

### **Under the Personal Information Tab**

- Update all fields to reflect 1 spouse

### **Click on the Additional Information Section**

- Postal Mail: Select Receive All Mailings **(This should be only selected for 1 spouse)**
- Marital Status: Select appropriate selection
- Salutation Name: i.e. Jorge and Noelia
- Date Joined
- Languages Spoken: Check all that apply

### **If this person has an email address entered**

#### **Click the ECONNECTS Tab**

Under Subscriptions

- Select Email for Magnificat

- Click Submit and Add Related Person

### **Select One**

- This person is a Contact
- This person is a User (requires email)

**NOTE: Select "This person is a User" if they have an email, otherwise select "This person is a Contact"**

Enter the following data:

- First Name
- Last Name (if different than spouse)
- Enter email address if available
- Phone Number(s)
- Verify Address is correct

### **Click on Additional Information Section**

- Postal Mail: Select Receive All Mailings **(This should be only selected for 1 spouse)**
- Marital Status: Select appropriate selection
- Salutation Name: i.e. Jorge and Noelia
- Date Joined
- Languages Spoken: Check all that apply

### **If this person has an email address:**

#### **Click on ECONNECTS tab**

Under Subscriptions

- Select Email for Magnificat

- Click Submit And View Profile button

**Instructions continue in the right column...**

### **Relationship**

- For "Is the" select Spouse
- For "Of" verify spouse's name is shown below the data input box
- For "Who is his/her" select Spouse
- Select Soft Donations
- Select Joint or Family Donations
- Select Override Default if necessary and enter both couples name. (Tom and Jane Smith)

- Click Submit

- Review Records

-

## Editing Special Cases: Changing a Contact to a User (with Login Capability)

Select Admin tab

- Locate the member's record. **If multiple records are found for a member, inform the Secretariat or Webmaster.**
- Click Edit button (pencil)

**Under the Personal Information Tab**

- Make sure the email address is correct

**Click the ECONNECTS Tab**

- Select Email for Magnificat
- Click Submit And View Profile button

**Click the Role Sub-Tab**

- Select Login Enabled
- Click Submit button
- Review Record

## Enabling Favorites and Recent Links Bars

- Login to the system
- Select My Information tab
- Select Settings sub-tab
- Click Edit Profile button
- Select Show Favorites Bar
- Select Show Recent Links Bar
- Click Submit button

## Adding Couples from New Team in Piloting Member Application

- Select Admin tab
- Click on the Activities tab
- Click on the Received Applications tab
- Click on the New Team in Piloting Member tab
- Open the Application Details button (i) in another web browser tab
- Review the Pilot Team Member Information
- If there are no questions regarding the Pilot Team Member Information, click on the Update Status button
- In the Final Outcome selection box select Approved
- Click Submit

### Group(s) & Person Type(s) - Click ADD button

- Groups:** Select Team Name
- Person Types:** Select Member Active
- Click Save button
- Click Submit

### Received Application Details: New Team in Piloting Member

- Click View Profile

### Person Profile Details

#### Click the Role Sub-Tab

- Select Login Enabled
- Click Submit button

- Click Edit Profile

### Click on ECONNECTS tab

Under Subscriptions

- Select Email for Magnificat

### Click on Additional Information Section

- Postal Mail: Select Receive All Mailings **(This should be only selected for 1 spouse)**
- Copy the Salutation Name: i.e. Jorge and Noelia
- Languages Spoken: Check all that apply
  
- Click Submit and Add Related Person

### Select One

- This person is a Contact
- This person is a User (requires email)

**NOTE: Select "This person is a User" if they have an email, otherwise select "This person is a Contact"**

**Instructions continue in the right column...**

Enter the following data:

- First Name
- Last Name (if different than spouse)
- Enter email address if available
- Phone Number(s)
- Verify Address is correct

### Click on Additional Information Section

- Postal Mail: **No selection for 2nd spouse**
- Marital Status: Select appropriate selection
- Salutation Name: i.e. Jorge and Noelia
- Date Joined
- Languages Spoken: Check all that apply

### If this person has an email address:

#### Click on ECONNECTS tab

Under Subscriptions

- Select Email for Magnificat

- Click Submit And View Profile button

### Relationship

- For "Is the" select Spouse
- For "Of" verify spouse's name is shown below the data input box
- For "Who is his/her" select Spouse
- Select Soft Donations
- Select Joint or Family Donations
- Select Override Default if necessary and enter both couples name. (Tom and Jane Smith)

- Click Submit

- Review Records