Salt Lake City Roadshow 2018

EXERCISES

Hands-On Training

ParishSOFT Family Suite

Religious Education

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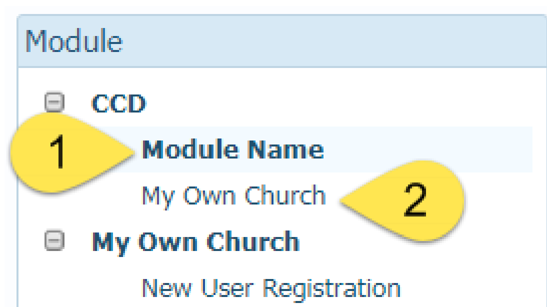
ParishSOFT

Administration

Exercise 1 - Lookups for Religious Education

1. Click on **Administration**
2. Click on **Lookups**
3. On the left hand side scroll down to **Religious Education** section at the bottom left.
    a. Click **Buildings**
        i. Click on
        ii. Type: **Church Center**
        iii. Click **Save**
    b. Click **Rooms**
        i. Building: Choose **Church Center** from the dropdown
        ii. Click **Select**
        iii. Click
        iv. Room Name: **101**
        v. Capacity **15** (# the room will hold)
        vi. Click **Save**
        vii. **Extra Practice** - Repeat for room 102 - 115
    c. Click **Leader Roles**
        i. Click
        ii. Class Leader Role: **Teachers Aid**
        iii. Click **Save**

Exercise 2 - Module Settings

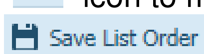


1. From the ***Administration*** tab
2. Click **Module Settings** - *Customize the label name for your staff*
    a. Module Name
        i. Click radio button next to **Custom**
        ii. Type in **CCD**
    b. Click Save Settings
3. Under CCD click **My Own Church -** *Customize label parishioners to see MOC register online.*
    a. MOC Access: **Enable**
    b. MOC Tab Label Click **Custom**
    c. Type in: **CCD**

d. Online Registration: **Enabled**
e. Click **Save Settings** at the bottom

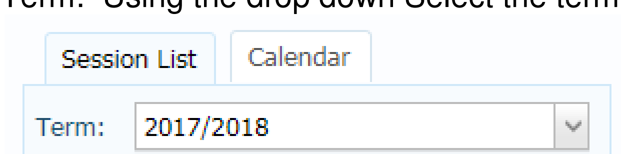
Term/Sessions/Classes/Students/Leaders

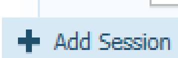
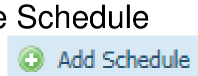
<u>Exercise 3 - Adding Terms</u>

1. Click on the **CCD** Tab
2. Hover your mouse over the ***Configuration*** button in the top right and then choose **Manage Terms** from the dropdown.
3. Click  to add a Term
   a. Enter (current year)/(next year) **2017/ 2018**
      i. *Can be a single year*
      ii. *Can contain text such as "Summer"*
   b. Set Start date **9/10/2017** and End date **5/20/2018**
      i. *This will be the time frame to include all of the sessions and classes that will be in the Term*
      ii. *Same calendar functionality as other CN modules*
      iii. *If the term is already listed you will want edit the term and perhaps updated start and end date. To edit the Term click*  *next to the term you wish to update. Note: If sessions are associated with the term you will need to delete the sessions.*
      iv. *Dates can't be changed latter. It's best to add additional days/weeks if there is a chance you would need "make up" dates at the end for example: snow days or hurricane.*
   c. Click **Save**
   d. Check the box to the left of 2016-2017 
   e. Click  icon to move the term to the top
   f. Click 

Exercise 4 - Adding Sessions

1. Hover your mouse over the ***Configuration*** button in the top right and then choose **Manage Sessions** from the dropdown.
2. Session List Tab (on left)
   a. Term: Using the drop down Select the term just created



3. Click 
4. The system will walk you through the process step-by-step
   a. Step 1: Session Details
      i. Term: Select the **Term** just created (Start/End Auto populate from Term)
      ii. Session Name: **Sunday**
      iii. Wait a couple of seconds or tab out of the field to progress to the next step
   b. Step 2: Date Schedule
      i. Click 

        ii. Step 1: Select Days
            1. Day(s) Click on box to the left of **Sunday**
                a. *Select the day or days of the week the session will meet*
                b. *You can have one or more days*
        iii. Step 2: Select Frequency
            1. **Every Week**
                a. *Every Week – same day(s) each week can add or remove dates in the next step*
                b. select 1+week(s) Each Month - allows you to have your session meet particular weeks of the Month
            2. Select Every Week from the drop down
            3. Click Add Schedule
    c. Add or remove dates holidays, special events, etc. Remove 11/26, 12/24, 12/31, 4/1
        i. Use Remove All *to remove all next to schedule if you realize the day(s) or the week or start date/end dates are incorrect. This will allow you to select specific dates from the calendar by clicking on the date.*
        ii. Use next to the date to remove specific dates.
        iii. Select a date from the calendar on the left to add it to the schedule on the right.
5. Click Save Session

Bulk Class Manager - Exercise 5A and 5B

Exercise 5A – Copy classes from another term

1. Hover your mouse over the ***Tools*** button next to Configuration and then choose **Bulk Class Manager** from the dropdown.
2. Click the button to the left of **Copy Classes from Another Term**
3. Term: choose **2016/2017**
4. Click the checkbox ☑ 10th Grade (For class please only do one class at a time).
    a. *Clicking the checkbox next to class name selects all the classes.*
    b. *If you only want a few classes you can select or deselect them one at a time.*
5. Click Term Session & Classes ▸ (bottom right)
6. Term: **2017/2018**
7. Session: **Sunday**
    a. *Verify Grades, Capacity, Department, Session and update if needed*
    b. Scroll down to Add Classes & Define Details
    c. Start Time **9:00 am** an**d End Time 10:00 am**
    d. Building: **No Building**
    e. Room: No Room
        i. You can assign buildings and rooms using the Classes tab and Schedule function or the Administration tab and LookUps.
        ii. *You can change buildings and rooms using the Classes tab and Schedule function or the Administration tab and LookUps.*
8. Click ☑ YES! I want to add the Classes above to selected DESTINATION Term and Session.
9. Click Add Classes at the bottom right.

    Extra Practice – repeat steps 1-9 again adding each class 1 at a time.

Exercise 5B – Manage Current Classes or Add Multiple Classes to Term

1. Hover your mouse over the ***Tools*** button next to Configuration and then choose **Bulk Class Manager** from the dropdown.
2. Click on the button to the left of **Manage Current Classes or Add Classes to a Term**
3. Click Term Session & Classes ▸ (bottom right)
4. Term: choose **2017 / 2018**
5. Toward the bottom of the page below Add Classes & Define Details - Chose Add 1
   a. More Class Rows Add
      i. *You can add 1, 5, 10 or 25.*
      ii. If you choose more than 1 you can use the trash can to delete extra/empty boxes.
6. Complete the boxes for Class Name: **2nd Grade**, Grades: **1**, Capacity: **15** and Department. **Student Education**
7. Click Confirm:* ☑ YES! I want to complete all class updates.
8. Click Complete Class Updates (bottom right)

   Extra Practice – repeat steps 1 -7 again adding the rest of the classes pre-school through high school.

Exercise 6A – Promoting Last Term's Students into this Term's Classes

1. Hover your mouse over the ***Tools*** button next to Configuration and then choose **Class Promotion** from the dropdown.
2. Step 1: Original Class
   a. Term: **2016/2017**
   b. Class: **1st Grade**
3. Step 2: Promotion Class
   a. Term: **2017/2018**
   b. Class: **2nd Grade**
4. Click the ⊕ next to Last Name to choose all of the students in the list.
   a. *If you want to remove a student click* ⊖
   b. *If you want to see family details click* ⊞
   c. *Note: if there are students in the class already if you do not see* ⊖ *you may have to go to the class list to remove the student.*
   d. *If the* ⊕ *is yellow rather than green it means they are already in a class. You can add them to multiple classes.*
5. Click Promote Students (bottom middle)

   Note: You can also add students from the Dash Board, Student Directory, Classes and Tools>Add by Family

   Extra Practice – repeat steps 1 -5 moving promoting students from the rest of the classes pre-school through high school.

Exercise 6B – Adding students who weren't part of a previous RE program

1. From the ***CCD*** tab **Student Directory**
2. Click on + **Add Students**
3. Step 1: Term: select the **2017/2018**
4. Class: **10th**
5. Step2: **Family Directory**
6. Step 3: Filter By Age: **16 to 16**
7. Click **Filter**
8. Click ⊕ to the left of the 1st student listed. Be sure to make sure the person is loaded on the right hand side before clicking another student. Add 1 – 6 more students.
9. Click Add Students
   Note: Students can be added from the following tabs: Dashboard: Add Students or Add by Family, Tools>Add by Family and the Member Tab.

Exercise 7 - Adding Leaders

1. From the ***CCD*** tab Click on **Leaders**
2. Term: **2017/2018**
3. View by: **Class**
4. Class: **1st Grade**
5. From the grid in the middle Click + Add Leaders
6. Step 1: Class Assignment – verify Term and Class
7. Step 2: **Family Directory**
8. Step 3: Under last name type **Smith**
   a. Click ⊕ to the left of **Smith, Heidi**
   b. Select Role: **Catechist**
   c. Search for **Allen, Justin**
   d. Click ⊕ to the left of Allen, Justin
   e. Select Role: **Assistant Catechist**
   f. Search for Young, Don
   g. Click ⊕ to the left of **Young, Joseph**
   h. Select Role: **Teachers Aid**
9. Click Add Leaders (bottom center)
   Note: You can also add leaders from the Classes tab and the Member Tab.
   Extra Practice – repeat steps 1-9 and add leaders to your class one at a time. Perhaps search by age or names to add leaders to your class.

Exercise 8 – Printing Labels

1. From the CCD tab click on **Student Directory**.
2. Find the **List of Quick Reports** on the right. Click on the dropdown and scroll down to see **Mailing Labels: To Parents**
3. Click the checkbox to the left of Student Name in the grid on the right.
    a. *If no one is selected it will give you labels for all in the list.*
    b. *If you only want one person click on the check box to the left of the person's name and repeat step 2.*
    c. *If you want multiple labels click on the check box to the left of each person you want a label for and repeat step 2.*
    d. *Within Religious Education mailing labels can be printed from each of the quick reports as well as the Reports tab.*

    Note: You can print mailing labels from all modules in ConnectNow with the exception of IQ. To print from IQ create a family or member workgroup and print from workgroups.

    Extra Practice – try printing one label and then 5 labels for students, and then repeat for parents.

Exercise 9 – Printing Registration forms

1. From the CCD tab click on **Reports**
2. Click Registration Forms
3. Click ◉Populated Registration Forms
4. Term: **2017/2018**
5. Registration Status: **Registered**
6. Family Group: **Active**
7. Student Age Range: leave empty
8. Families: **Abler, Tracey**
9. Click **Generate Report** (bottom middle)

    Extra Practice –
    a. Run a class Roster & schedules report
        i. Overview: Show
        ii. Leaders: Names Only (Door hanger)
        iii. Students: Names only (Door hanger)
        iv. Schedules: Show
        v. Sorting Options: Grade name (Order defined in LookUp Management)
        vi. Report Summary: Show
        vii. Term: 2017/2018
        viii. Classes: All Classes in Term
        ix. Generate Report
    b. Run a Mailing Labels reports
        i. Grouping: One Label per Family
        ii. People: Students
        iii. Recipient Line: Family Informal name
        iv. Term: 2017/2018
        v. Classes: By Grade
        vi. Generate Report

Exercise 10 – Adding Attendance

1. From the CCD tab click on **Classes**
2. Click Students Leaders Attendance Schedule Notes Sacraments
3. Two ways to add attendance:
    a. By date
        i. Click on the date you wish to update
        ii. Update all to present by clicking on Present?
            1. *Present: has the option for Tardy*
            2. *Absent: option for Excused*
            3. *You can change individuals to absent by clicking on the corresponding check box to the right of the students name.*
            4. *Both fields give you an area for Notes.*
        iii. Click next to one of the students to change it to absent.
        iv. Click next to another student to change it to absent.
        v. Click the dropdown and change it to excused.
        vi. Notes: **Family Vacation**
        vii. Once completed click **Save.**

    Extra Practice – Choose another Date and follow step above.

    b. By Students
        i. Above the Dates are you will see Records and **View by Student click** on View by Student
        ii. Choose a student in the dropdown box.
        iii. Click View
        iv. Click Manage Attendance (above the dates)
        v. If you use this method the first time you put in attendance you can choose Update all to present by clicking Present?. **Important note:** If you already have attendance entered do not use this as it will change everything to present or absent depending on which is listed in the box between Date and Notes.
        vi. Once completed click **Save Attendance.**

    Note: Attendance can also be added from the Dashboard.

Extra Practice

Exercise 11 – Sending Email

1. From the CCD tab click on Classes
2. Click Email
3. In the dropdown box under Unique Email count change it to: Students & Parents
    a. In the Religious Ed module you can choose students, Parents or both.
    b. On other tabs in RE the email icon is 
4. Click **Load from Grid**
5. Click OK
6. Click Send Web Based Email ▼
7. Always choose **BCC** to keep email address private
8. The Password: (password for the email listed to the left in the From: area).
9. To: it will always send you a copy.
10. Subject:
11. Attach: up to 3 files
12. Text box can be formatted with some of the same functionality of word.
13. Click Send Email Now

Email Troubleshooting Steps

1. There is a setting within Gmail that prevents less secure apps from accessing your email. You'll want to turn that off and also turn off the two-step verification. (https://support.google.com/accounts/answer/6010255?hl=en) will take you to instructions for allowing less secure apps to access your email. (https://support.google.com/accounts/answer/185839?hl=en) will take you to instructions for turning off the two-step verification. Once those settings are changed, try sending a test message through ConnectNow. I'll return this ticket to the "Pending" status so you'll have some time to update your settings and send that test email.
2. Storing multiple address: use a ; and no space in the email address: ie. training@parishsoft.com;support@parishsoft.com
3. We don't support emails from/for Office 365 as it requires authentication
4. What support needs to set your email address up in our system if it's not a common email such as @gmail.com, @yahoo.com, @sbcglobal.com, @att.com,@comcast.com, etc.
    a) outgoing mail server name
    b) port number
    c) domain name
    d) is it ssl encrypted?

Exercise 12- Managing Online Registration

1. Hover your mouse over Configuration and then choose **Mange Online Registration** from the dropdown.
2. Click on a term where the status is open i.e. **2016/2017**
3. On the right click on the checkbox next to ☑ **Class Name**
4. Click ⊘ Close
    a. *You can list specific classes by click the check box to the left of the name and then click on Open*
    b. *To Close items click on the click on the check box to the left of the name and then click on Closed*
    c. *Only open classes will be listed on the RE MOC tab*

Extra Practice – repeat steps 3 -4 again closing all classes in term 2016/2017.

Example:

☐	10th Grade	Closed	10
☐	Confirmation	Closed	7
☐	First Communion	Closed	2

Exercise 13 - Processing Pending Registrations

1. In the upper right corner you should see Pending Registrations and a # i.e. Pending Registrations 2 . Click on the #
2. Select Term: 2017/2018
3. Make sure that the View: dropdown menu is set to **All**, and that the Class Chosen: dropdown menu is set to **All Classes**.
4. Check both boxes to the left of **Student Added** and **Registration Canceled**. This will ensure that families get an email when you have finished processing their registration.
5. Click the Add button for the first student on the list.