

RELIGIOUS EDUCATION MODULE

1. SET UP YOUR TERM, CLASSES and SESSIONS:

- Logon to ChurchDB
- Click on Education module
- Click on 'Setup' link
 - **Click on Billing Preferences – you only have to do this the FIRST TIME you begin using R.E.**
 - Click [Add New] if nothing exists
 - Enter Description (“R.E Class Fees” or “Tuition”)
 - Enter the email address of the D.R.E. in the R.E. Director, Volunteer Requests and Notification R.E. boxes
 - Click [Add]
- Click on 'Setup' link
- Click on 'Term Setup' link – **this is your “school year” and can be done YEARS in advance**
 - Click on 'Add New Term' button
 - Enter name of new term such as '2013-2014'
 - Enter term start date such as '09/01/2013'
 - Enter term end date such as '05/31/2014'
 - Enter registration start date such as '08/01/2013'
 - Enter registration end date such as '05/01/2014'
 - Click on the 'Add' button
 - Click on the 'Save' button
- Click on 'Setup' link
- Click on 'Course Setup' link – **this is WHAT is taught and needs only to be done ONCE ever**
 - Click on 'Add New Course' button
 - Enter course number such as 'RE-5'
 - Enter title such as '5th'
 - Enter course description such as 'Fifth Grade'
 - Enter the credit hours such as '0'
 - Use the drop-down list to choose the fund account to associate with this course. If no fund account is chosen, the default will be what was chosen in the 'Preferences Setup' screen.
 - Click on the 'Add' button
 - Continue entering 'Add New Courses' until all courses have been added.
 - Click on the 'Save' button.
- Click on 'Setup' link
- Click on 'Classes' link – **Classes are dates and time each COURSE is taught during a TERM.**
- Click on 'Class List'
 - Click on 'Add New Class' button
 - Using the drop down boxes, choose the appropriate 'Term' and 'Course'
 - Check the boxes next to the appropriate grade(s)
 - Name the class such as 5A – Sun 9am
 - Enter start and end date, start and end time, display on calendar (set as default) and recurrence such as weekly.
 - Another box will open up where it will show which day of the week the class will recur on. Note: If class is held on Sundays, the start date should be the first Sunday of the defined term.
 - The contact name is required. This should be the person responsible for the overall RE classes – not the teacher. The number of teachers and students can be entered but are optional fields.
 - Click on the 'Save' button.
 - Repeat steps until all classes have been entered.

2. REGISTER STUDENTS, TEACHERS, CLASS ASSISTANTS

- Click on 'Setup' link
 - Click on 'Classes' link
 - Click on 'Student, Teacher, Helper Registration' link
 - o Enter Last and First name (full or partial)
 - o Select Term
 - o Select Class
 - o Click on the Student, Teacher or Helper Link next to the name you wish to register.
 - o All of the fields on this screen are optional for you but may be required if specified on the 'Preferences Setup' page.
 - o Click on the 'Add Student' button.
 - o A confirmation page will come up showing the registration with several links.
- Click on the 'Register another student' link to add another student. The screen will be the same as when you registered the previous student. Make the appropriate changes to register the next student.
- o Repeat until all students are registered.

IF YOU USED CHURCHDB FOR R.E. PREVIOUSLY: YOU CAN COPY STUDENTS FROM ONE CLASS INTO THE A NEW ONE IN THE NEXT TERM!

- Click 'Classes'
- Click 'Registrant Transfer By Class'
- o Use to move one class into another class made in a new course and term.
- o TO MOVE TO A NEW TERM: Leave the Transfer Type as "KEEP"
- o From the drop-down box, choose the OLD term and OLD class
- o Select the NEW term and NEW class
- o You can move ALL students or just selected ones by checking the [Transfer] box for each student and clicking [Copy All Checked Registrants]

3. TO RECORD ATTENDANCE:

- Click on 'Class Sessions'
 - o Choose the Term
 - o Choose the Class. All of the class sessions will appear.
 - o Select the Record Attendance Option to the right of each weekly session to mark absences
 - o Click on the 'Save' button.

4. CDB REPORTS for RELIGIOUS EDUCATION:

- o 'Potential RE Families' to create an Excel list of potential students with family contact information
- o 'Class Rosters'
 - Leave Classes blank to print all or choose one or more (see tool-tip for more info)
 - Use as information sheets for teachers by choosing the 'Check to Show Details' button
 - Use to post Class with Teachers and Students by choosing the 'Large PDF' button
- o 'Attendance Matrix Report' take attendance in classrooms to be entered into ChurchDB at a later time.
- o 'Individual Attendance Report' show parents attendance record; can be sent to another church to show class attendance
- o 'Sacrament Report' use as tool for sacrament preparation
- o 'Registered Students by Grade Report' shows how many students in each grade are registered
- o 'Emergency Information' prints a page per student of family contact and (if entered) medical information
- Click on 'More'
 - o 'RE Contributions'
 - Shows funds collected.
 - Run CSV Report to create spreadsheet. Can be sorted by fund.
 - o 'Assign Sacrament by Class'
 - Can assign sacrament information to students within a class.
 - Can print Certificates.

5. TO CREATE MAILING LABELS or EMAIL FOR CLASSES:

- Click on 'Communications'
 - o Select the Term and then click on the button to proceed
 - o Select Grade(s) and then click on the button to proceed
 - o Select Class(es)
 - o Choose appropriate buttons at end of screen based on what you are trying to accomplish.

Choosing Email as an output can only be sent using plain text. After sending the email, you can create the mailing labels for families without email using the Mailing Labels (No Email) option. Click on the Submit button to complete your request.

6. GENERAL NOTES:

- Any changes made to tuition or fees once students are registered are not retroactive. Make changes only with great care!
- Put the cursor over the yellow question marks for tool-tips.
- Choosing CSV creates a file that will open in Excel. It can be used as a spreadsheet or as a file for a mail merge.
- Choosing PDF will create nicely formatted, printable letters.
- HTML will put reports on the screen only.
- If you need a logon to ChurchDB, please send your request via email to ITSupport@ptdiocese.org. If your Parish Office Manager has any questions about allowing access, we CAN limit you to ONLY the Education areas.
- I've skipped several options on set-up that are not used by most of our parishes. The full explanation is available under the "Messages" page in the "Instructions" Religious Education Module" after logging in to ChurchDB.