

## ChurchDB Module: Calendar

### HOW TO SEE WHAT'S GOING ON TODAY

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on **Calendar**
- 3) Click on **This Week** or **This Month** to see further lists
- 4) Click on any date in the calendar on the **right side of the screen** to see that date
- 5) Click on the [blue hypertext](#) for an event to see details of the event

### HOW TO PRINT A CALENDAR REPORT

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on **Calendar**
- 3) Enter the date range in the quick look up boxes on the front page.
- 4) Click **Print**
- 5) Print the PDF file that opens.

### OR WITH EDIT PRIVILEGES:

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on **Calendar**
- 3) Click on **Reports**
- 4) Click on **Event Report**
- 5) Enter the **date range** – you can type it in with mm/dd/yyyy format or click the blue calendar icon to click on the date from a calendar
- 6) Choose your **event type** (Faith Formation classes can be separated from other reservations)
- 7) Click on **Run** for the type of report you want
  - a) **HTML:** shows up in your ChurchDB window (to look at only)
  - b) **Plain Text:** open report with Notepad
  - c) **CSV:** open report with Excel
    - i) Download the file generated.

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### HOW TO SEARCH FOR A SPECIFIC EVENT

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on **Calendar**
- 3) Enter the **date range** you are searching in the search field.
- 4) You can type text in the **Filter** box if you know all or part of the event's title to pull up only events with that/those words or leave this blank.
- 5) Click **View** or **Print**. This does *\*not\** give you electronic options such as a CSV report. That feature is only available to those who have "Edit" abilities for the Calendar module (receptionists and administrators).

### OR WITH EDIT PRIVILEGES:

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on **Calendar**
- 3) Click on **List of Events**
- 4) Look up your Event (listed by start date)

### HOW TO ENTER AN EVENT INTO THE CALENDAR

- 1) Open the **ChurchDB log in page** & log in
- 2) Click on **Calendar**
- 3) Check your event's potential date for any conflicts. **Be sure to click on any event that looks like it could have a large crowd and check on the number expected incase there is a parking shortage that day.**
- 4) Click on **Add Event** at the top of the page
- 5) Fill in all of the fields as follows. It is EXACTLY like filling out the paper form. An \* means it is required by the website in order to save a reservation, but all of these sections are required by us.
  - a) **\*Name:** The Name of Your Event.
  - b) **Description:** This section is optional. It is what people who access the calendar via the web will see if they click on the name of your event.
  - c) **Set as Parent Event:**
  - d) **\*Start Date:** The first date of your event, or the only date of your event if it occurs once.

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- e) **\*End Date:** The last date of your event, or the only date of your event if it occurs once.

**IF THIS IS AN ALL DAY EVENT, CHECK THE BOX LABELED ALL DAY EVENT NOW AND SKIP THE START TIME AND END TIME.**

- f) **\*Start Time:** The start time of your event. This is the actual event start time, not the time you need to be in the room to set things up but the time the event begins.
- g) **\*End Time:** The end time of your event. This is the actual event end time, not the time you need to be in the room after the event to clean up but the time the event ends.
- h) **Make Available to Public Website:** Allows anyone to see your event. Leave the check mark in this box if you want people other than the staff to be able to see the event on the calendar. Uncheck it if the public should not see the reservation.
- i) **Display on Calendar:** Allows only signed in staff to see your event. **ALWAYS leave this box checked** so that staff working on the calendar can see your event.
- j) **\*Recurrence:** Use these features if your event lasts for more than one day.
  - i) **None:** The event does not happen again on a recurring schedule.
  - ii) **Daily:** The event happens every day within the date range at the specific time noted (not an all day event!).
  - iii) **Weekly:** Fill in the number of weeks between sessions and check the correct day(s) of the week on which the event occurs (Ex: every 2 weeks on Tuesday)
  - iv) **Monthly:** Click the **Radio Button** next to Pattern to fill in the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, etc. Monday, Tuesday, Wednesday, etc. of each month (Ex: first Wednesday of every month)
  - v) **Full Range:** The reservation needs to take place every minute between the start time and end time, over several days. Full Range can only be used in 5-day increments. (Ex: 9 a.m.-5 p.m. every day between the Start Date and End Date. **Full Range should be used for any reservation that occurs continuously overnight.**
- k) **\*Display To:** Site displays information to those who use ChurchDB. Author Only displays information only to the person who created the Event. Selected Groups displays information only to Groups added to the Event (see q below).

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- l) **# Expected:** Helpful to fill in for seating and parking planning.
- m) **\*Contact Name:** Person to contact for more info about the event or for questions about the reservation.
- n) **Contact Phone:** Daytime phone number of contact person.
- o) **\*Contact E-mail:** Required in order to send confirmation e-mails.
- p) **Notes:** This is where you can put set up notes (Ex: Theatre for 50, Dinner for 60 with round table and white table clothes, podium, extension cord...).
- q) **Groups:** Adding Groups from those existing in ChurchDB Groups module will show this Event on those Groups' Event page.
- r) **Resources:** The Add Resource button takes you to a list of all our resources. Click here to book a room, the projector, etc.
  - i) **How to Book a Resource:**
    - (1) Find the resource you want to book in the list of resources. If the button to the left of the name of the resource is **RED** it is not available. If the button is **GREEN** you can book it, but FIRST...
      - (i) **Before you book a resource, add set up and break down times** in the columns to the right of the resource if you need them. You may add up to 120 minutes (2 hrs) for each. **IF YOU NEED TO BOOK MORE THAN 2 HOURS FOR SET UP OR BREAK DOWN, CREATE A SEPARATE RESERVATION AND TITLE IT “(NAME-OF-EVENT) SET UP” OR “(NAME-OF-EVENT) BREAK DOWN”**
      - (ii) Click the green **Book It** button to the left of the resource name.
      - (iii) When you have finished adding resources, click the yellow **BACK** button in the ChurchDB window (NOT the browser back button) and you will be taken back to your event main page.
    - ii) **Exceptions:** If your event takes place on more than one day, a yellow button that says **Manage Exceptions** will appear.
    - iii) When you click on this button a list of all the dates in your reservation will show up. You can individually manipulate time changes and room changes

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on this screen using the links provided next to each date. Each link is self-explanatory. You might have to click through a couple of confirmations.

- iv) You can also **Add a New Date** (yellow button at the top of the page).
  - v) When you are finished with exceptions click the yellow **BACK** Button on the ChurchDB window.
- 2) Now your reservation should be completely filled out. Click the yellow **SAVE** button.