

Religious Ed exports and class rosters in Connect Now

- 1) First, log into **ConnectNow** and you will be at your typical homescreen:

The screenshot shows the ConnectNow Family Suite interface. The top navigation bar includes links for HELP, CONTACT, HOME, and SIGN OUT. The user is logged in as Anna Delaney (Anna Delaney) from St. Joseph Parish, Baraboo. The main navigation tabs include Home, Family Directory, Faith Formation, Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below the navigation, there are sections for Quick Links (Home, My Own Church, Family List, Member List) and Suspense Activity (Families With Suspense Activity (0), New Users In Suspense (2)).

- 2) Click on the **Religious Ed** tab. (note, it could be listed differently if you've customized the name, as seen above in the "Faith Formation" tab that St. Joseph's in Baraboo is using) you will note your main **Dashboard** with the overall information on the classes/sessions you've set up.

The screenshot shows the ConnectNow Family Suite interface with the Religious Ed tab selected. The user is logged in as User1 (Kimberly Spindler) from Good Shepherd Parish, Lima. The main navigation tabs include Home, Family Directory, Religious Ed, Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below the navigation, there are sections for Dashboard, Student Directory, Classes, Leaders, Calendars, Reports, Tools, and Configuration. The Dashboard section includes a table of Classes, Today's Date & Time (10:51 am, Monday, August 17, 2015), Term Summary (Term: 2015/2016, 09/20/2015 - 05/26/2016, Students: 8, Leaders: 2, Classes: 2), and Upcoming Dates (09/07/2015 - Labor Day, 10/04/2015 - Feast of St Francis of Assisi, 10/12/2015 - Columbus Day, 10/31/2015 - Halloween, 11/01/2015 - All Saints' Day, 11/01/2015 - Daylight Saving Time ends, 11/02/2015 - All Souls' Day, 11/11/2015 - Veterans Day, 11/26/2015 - Thanksgiving Day).

| Class | Students |
|--------------|----------|
| First Grade | 5 |
| Kinder Class | 3 |

Exporting to Excel:

- 1) If for any reason you wish to pull into Excel a document with student's information, you can click on the **Student Directory** tab, listed under the

Religious Ed tab and from there you can export the information seen in the grid.
(you can either click on a specific class, or leave it listed as the whole session)

ConnectNow Family Suite
Good Shepherd Parish, Lima
User1 (Kimberly Spindler)

Home | Family Directory | **Religious Ed.** | Offering | Ministry Scheduler | Tuition | IQ | Administration

Dashboard | **Student Directory** | Classes | Leaders | Calendars | Reports | Tools | Configuration

Student Directory | Good Shepherd Parish, Lima

Class List | Calendar

Term: 2015/2016
View By: Class

| Class | Students |
|--------------|--------------|
| 2015/2016 | Deselect All |
| First Grade | 5 |
| Kinder Class | 3 |

2015/2016

| Student Name | Class | Grade | Birth Date | Age | M/F | Family Last |
|----------------------|--------------|-------|------------|-----|-----|---------------|
| Altman, Lauren | First Grade | 1 | 09/19/2008 | 6 | F | Altman |
| Aschenbrenner, Brock | Kinder Class | K | 09/24/2009 | 5 | M | Aschenbrenner |
| Aschenbrenner, Reese | Kinder Class | K | 09/24/2009 | 5 | F | Aschenbrenner |
| Bradley, Barbara | First Grade | 1 | 03/11/2009 | 6 | F | Bradley |
| Flemming, Sloan | Kinder Class | K | 06/03/2010 | 5 | F | Flemming |
| Kube, Joel | First Grade | 1 | 08/22/2008 | 6 | M | Kube |
| Sedlacek, Riley | First Grade | 1 | 09/03/2008 | 6 | F | Sedlacek |
| Wollet, Adyson | First Grade | 1 | 12/17/2008 | 6 | F | Wollet |

2) Click the **CSV** button indicated below to export what is shown on your screen.

ConnectNow Family Suite
Good Shepherd Parish, Lima
User1 (Kimberly Spindler)

Home | Family Directory | **Religious Ed.** | Offering | Ministry Scheduler | Tuition | IQ | Administration

Dashboard | **Student Directory** | Classes | Leaders | Calendars | Reports | Tools | Configuration

Student Directory | Good Shepherd Parish, Lima

Class List | Calendar

Term: 2015/2016
View By: Class

| Class | Students |
|--------------|--------------|
| 2015/2016 | Deselect All |
| First Grade | 5 |
| Kinder Class | 3 |

2015/2016

| Student Name | Class | Grade | Birth Date | Age | M/F | Family Last |
|----------------------|--------------|-------|------------|-----|-----|---------------|
| Altman, Lauren | First Grade | 1 | 09/19/2008 | 6 | F | Altman |
| Aschenbrenner, Brock | Kinder Class | K | 09/24/2009 | 5 | M | Aschenbrenner |
| Aschenbrenner, Reese | Kinder Class | K | 09/24/2009 | 5 | F | Aschenbrenner |
| Bradley, Barbara | First Grade | 1 | 03/11/2009 | 6 | F | Bradley |
| Flemming, Sloan | Kinder Class | K | 06/03/2010 | 5 | F | Flemming |
| Kube, Joel | First Grade | 1 | 08/22/2008 | 6 | M | Kube |
| Sedlacek, Riley | First Grade | 1 | 09/03/2008 | 6 | F | Sedlacek |
| Wollet, Adyson | First Grade | 1 | 12/17/2008 | 6 | F | Wollet |

Do you want to open or save StudentList.csv from connectnow.parishsoft.com?

Open | Save | Cancel

- 3) Your computer will show the document that you requested to open as seen above. Clicking **Open** in the dialogue box will open the document in a MS Excel document, as seen below:

| Student Name | Class | Grade | Birth Date | Member # | Age | M/F | Family Last |
|----------------------|--------------|----------|------------|----------|-----|---------------|-------------|
| Altman, Lauren | First Gradi | 1 | ##### | 684071 | 6 | F | Altman |
| Aschenbrenner, Reese | Kinder Cla K | ##### | 687194 | 5 | F | Aschenbrenner | |
| Aschenbrenner, Brock | Kinder Cla K | ##### | 687193 | 5 | M | Aschenbrenner | |
| Bradley, Barbara | First Gradi | 1 | ##### | 684192 | 6 | F | Bradley |
| Flemming, Sloan | Kinder Cla K | 6/3/2010 | 1055633 | 5 | F | Flemming | |
| Kube, Joel | First Gradi | 1 | ##### | 683677 | 6 | M | Kube |
| Sedlacek, Riley | First Gradi | 1 | 9/3/2008 | 683901 | 6 | F | Sedlacek |
| Wollet, Adyson | First Gradi | 1 | ##### | 683837 | 6 | F | Wollet |

- 4) From here you can format the document as you wish.
 5) If you would like to see more information in the spreadsheet, then close out of the excel document and go back to the main **Student Directory** listing. From there, click the **Grid** icon, which says **Select Grid Columns**.



and select the following:

Family (which lists the family's main Last Name followed by the First Name) and anything else you wish to see:

Then click **Save & Close** as seen above.

- 6) The computer will refresh and list the family information, as seen below, if you scroll over to the right on the main screen:

Class List Calendar

Term: 2015/2016

View By: Class

2015/2016 Deselect All

| Class | Students |
|--------------|----------|
| First Grade | 5 |
| Kinder Class | 3 |

2015/2016

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: Filter Column: Student Name Clear Filter

Ascending

+ Add Students csv Grid: List of Quick Reports 25 records

| Class | Grade | Birth Date | Age | M/F | Family Last | Family |
|--------------|-------|------------|-----|-----|---------------|----------------------------------|
| First Grade | 1 | 09/19/2008 | 6 | F | Altman | Altman, Robert and Debra |
| Kinder Class | K | 09/24/2009 | 5 | F | Aschenbrenner | Aschenbrenner, Brandon and Libby |
| Kinder Class | K | 09/24/2009 | 5 | M | Aschenbrenner | Aschenbrenner, Brandon and Libby |
| First Grade | 1 | 03/11/2009 | 6 | F | Bradley | Bradley, Barbara |
| Kinder Class | K | 06/03/2010 | 5 | F | Flemming | Flemming, Matthew and Mandy |
| First Grade | 1 | 08/22/2008 | 6 | M | Kube | Kube, James |
| First Grade | 1 | 09/03/2008 | 6 | F | Sedlacek | Sedlacek, Brian and Kristy |
| First Grade | 1 | 12/17/2008 | 6 | F | Wollet | Wollet, Larry and Julie |

- 7) If you repeat the export, your exported document will now have additional column with the additional information in it, as seen below:

StudentList.csv - Microsoft Excel

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|----------------------|--------------|-------|------------|-------------|-----|-----|---------------|----------------------------------|-------------------|---|---|
| 1 | Student Name | Class | Grade | Birth Date | Member DUID | Age | M/F | Family Last | Family | Address | | |
| 2 | Altman, Lauren | First Grade | 1 | 9/19/2008 | 684071 | 6 | F | Altman | Altman, Robert and Debra | 4740 Harvest Ln | | |
| 3 | Aschenbrenner, Reese | Kinder Class | K | 9/24/2009 | 687194 | 5 | F | Aschenbrenner | Aschenbrenner, Brandon and Libby | 4123 Kingsmoor Dr | | |
| 4 | Aschenbrenner, Brock | Kinder Class | K | 9/24/2009 | 687193 | 5 | M | Aschenbrenner | Aschenbrenner, Brandon and Libby | 4123 Kingsmoor Dr | | |
| 5 | Bradley, Barbara | First Grade | 1 | 3/11/2009 | 684192 | 6 | F | Bradley | Bradley, Barbara | 2940 N McCord Rd | | |
| 6 | Flemming, Sloan | Kinder Class | K | 6/3/2010 | 1055633 | 5 | F | Flemming | Flemming, Matthew and Mandy | 969 Acapulco St | | |
| 7 | Kube, Joel | First Grade | 1 | 8/22/2008 | 683677 | 6 | M | Kube | Kube, James | 4133 Stannard Dr | | |
| 8 | Sedlacek, Riley | First Grade | 1 | 9/3/2008 | 683901 | 6 | F | Sedlacek | Sedlacek, Brian and Kristy | 2727 Winsted Dr | | |
| 9 | Wollet, Adyson | First Grade | 1 | 12/17/2008 | 683837 | 6 | F | Wollet | Wollet, Larry and Julie | 4112 Elmhurst Rd | | |

Printing RE Reports:

- 1) To print off some class rosters, click on the **Report** area in blue, under the main **Religious Ed** tab, as seen below in Connect Now.

ConnectNow Family Suite HELP - CONTACT - HOME - SIGN OUT

Good Shepherd Parish, Lima
User1 (Kimberly Spindler)

Home Family Directory **Religious Ed.** Offering Ministry Scheduler Tuition IQ Administration

Dashboard Student Directory Classes Leaders Calendars **Reports** Tools Configuration

Religious Ed. Reports Good Shepherd Parish, Lima

Class Rosters & Schedules

Class Lists

Mailing Labels

Sacraments List

Class Attendance Sheets & Records

Class Rosters & Schedules

Data Options:

Overview: Show Hide The overview shows general information about the class.

Leaders: Standard Names Only (Door hanger) Hide

Students: Standard Detailed (Standard + Parent Details) Names Only (Door hanger) Parents Only Birthdays Only Hide

Schedules: Show Hide Schedules show the complete date and room schedule for the class.

- 2) Underneath the main header in the middle where it lists: **Data Options** you have the option of selecting and including or excluding different areas on your report.

Each section will be described below along with a screen shot example of what it looks like in the report itself. Please select each option you'd like to see and then click the **Generate Report** area at the bottom of the report.

- A sample of what the **Overview** section looks like is seen below for one class. Clicking to **Show**, as seen below

Class Rosters & Schedules

Data Options:

Overview: **Show** Hide

The overview shows general information about the class.

will make the following show on your reports:

K > Kinder Class

Overview

Term: 2015/2016 Session: **Sunday 9:30 am** Dates: 09/20/2015 to 05/26/2016 Dates: 36

Grades: K Students: 3 Leaders: 2 Department: **Student Education**

- In the **Leaders** area, if you indicate the **Standard** report

Leaders: **Standard** Names Only (Door hanger) Hide

you will see the following information show prior to the student's information:

Leaders (2)

| Leader | Role | Address | City | ST | Zip | Home Phone | Cell Phone | Email |
|----------------|---------------------|--------------------|-----------|----|-------|------------|------------|-------|
| Aaland, Thomas | Catechist | 2516 Aldringham Rd | Ypsilanti | MI | 48197 | 555-2222 | 555-9090 | |
| Aasen, Kathy | Assistant Catechist | | Ann Arbor | MI | 48108 | 555-2222 | 555-9090 | |

If you click the **Names Only (Door hanger)** version you will only see the leader's names and roles as seen below:

Leaders (2)

Aaland, Thomas (Catechist)
Aasen, Kathy (Assistant Catechist)

- In the **Students** options, if you click on the **Standard** report, you will see the following information:

Students (3)

| Student | DOB | Age | Address | City | ST | Zip | Parents | Primary Ph. | Family Email |
|----------------------|------------|-----|-------------------|--------------|----|-------|---------|-------------|---------------------|
| Aschenbrenner, Brock | 09/24/2009 | 5 | 4123 Kingsmoor Dr | Ann Arbor | MI | 48108 | | 555-2222 | demo@parishsoft.com |
| Aschenbrenner, Reese | 09/24/2009 | 5 | 4123 Kingsmoor Dr | Ann Arbor | MI | 48108 | | 555-2222 | demo@parishsoft.com |
| Flemming, Sloan | 06/03/2010 | 5 | 969 Acapulco St | Laguna Beach | CA | 92651 | | | |

If you click the **Detailed (Standard & Parent Details)** option under the Students area, you will see the following show up on the report:

Students (3)

| Student | Grade | DOB | Age | Address | City | ST | Zip | Primary Phone | Family Email |
|----------------------|---|------------|-----|-------------------|--------------|----|-------|---------------|---------------------|
| Aschenbrenner, Brock | K | 09/24/2009 | 5 | 4123 Kingsmoor Dr | Ann Arbor | MI | 48108 | 555-2222 | demo@parishsoft.com |
| | Emergency Contact: Phone: 555-3333 Desc.: --- | | | | | | | | |
| Aschenbrenner, Reese | K | 09/24/2009 | 5 | 4123 Kingsmoor Dr | Ann Arbor | MI | 48108 | 555-2222 | demo@parishsoft.com |
| | Emergency Contact: Phone: 555-3333 Desc.: --- | | | | | | | | |
| Flemming, Sloan | K | 06/03/2010 | 5 | 969 Acapulco St | Laguna Beach | CA | 92651 | | |
| | Emergency Contact: Phone: --- Desc.: --- | | | | | | | | |

Clicking on the **Names only (doorhanger)** version of it, shows the following:

Students (3)

- Aschenbrenner, Brock
- Aschenbrenner, Reese
- Flemming, Sloan

Clicking on the **Parents only** version in the Students area shows the student's listing as the following: (if the parent's aren't added under the student's record, they won't show up, as seen below with 2 of the students)

Students & Parents

Students: 3

Parents: 2

| Student | Parent Name | Role | Address | City | ST | Zip | Home Phone | Cell Phone | Email |
|----------------------|-----------------------|--------|-------------------|-----------|----|-------|------------|------------|-------|
| Aschenbrenner, Brock | | | | | | | | | |
| | | | | | | | | | |
| Aschenbrenner, Reese | Brandon Aschenbrenner | Father | 4123 Kingsmoor Dr | Ann Arbor | | 48108 | 555-2222 | 555-9090 | |
| | Libby Aschenbrenner | Mother | 4123 Kingsmoor Dr | Ann Arbor | | 48108 | 555-2222 | 555-9090 | |
| Flemming, Sloan | | | | | | | | | |
| | | | | | | | | | |

Lastly, under the **Students** area, if you click the **Birthdays only** option, your report will show the format as seen below:

Students Birthdays

Students: 3

| Student | Birthday | Current Age |
|----------------------|------------|-------------|
| Aschenbrenner, Brock | 09/24/2009 | 5 |
| Aschenbrenner, Reese | 09/24/2009 | 5 |
| Flemming, Sloan | 06/03/2010 | 5 |

- In the **Schedules** area, if you click the radial button to **Show** this option, the section below will show up. (which lists the schedule of what days the class is meeting, along with the important events that are in the system and what building, day, and room the classes are meeting in.)

Start / End: 09/20/2015 to 05/26/2016 **Dates:** 36 **Session:** Sunday 9:30 am

| Date | Day | Building | Room |
|------------|-------------------------------|---------------|------|
| 09/20/2015 | Sunday | Parish Office | REP |
| 09/27/2015 | Sunday | Parish Office | REP |
| 10/04/2015 | Feast of St Francis of Assisi | | |
| 10/04/2015 | Sunday | Parish Office | REP |
| 10/11/2015 | Sunday | Parish Office | REP |
| 10/18/2015 | Sunday | Parish Office | REP |
| 10/25/2015 | Sunday | Parish Office | REP |
| 11/01/2015 | All Saints' Day | | |
| 11/01/2015 | Daylight Saving Time ends | | |
| 11/01/2015 | Sunday | Parish Office | REP |
| 11/08/2015 | Sunday | Parish Office | REP |
| 11/15/2015 | Sunday | Parish Office | REP |
| 11/22/2015 | Sunday | Parish Office | REP |
| 11/29/2015 | First Sunday Advent | | |
| 11/29/2015 | Sunday | Parish Office | REP |
| 12/06/2015 | Sunday | Parish Office | REP |
| 12/13/2015 | Sunday | Parish Office | REP |
| 12/20/2015 | Sunday | Parish Office | REP |
| 12/27/2015 | Sunday | Parish Office | REP |
| 01/03/2016 | Sunday | Parish Office | REP |

- Lastly the **Report Summary** area is often not printed, but it shows the following information if you request it to show, on the first page:

Report Summary

Overview: **Hide**

Leaders: **Hide**

Students: **Hide**

Schedule: **Hide**

Primary Sort: **Grade name (Order defined in Lookup management)**

Secondary Sort: **Class Name (A to Z)**

Report Summary: **Show**

Term: **2015/2016**

Classes: **All classes in term**