Attendance

The Attendance module helps you keep accurate records of who's coming and going in your organization. You can use it to discover which classes have high enough attendance rates to warrant a duplicate class, who has perfect Sunday School attendance, who may need a visit to remind them why they love being a part of your organization, and to track attendance for budgetary purposes.

In **Enter/Post Attendance**, you can enter and post a group's attendance, and in **Inquiry**, you can view an individual's attendance information. You can also view the markings for an individual's year, month, or weekly attendance, and view a summary of the Master Groups you have created. You can even print this information.

You can also add, edit, or delete individual records, or you can add and delete individuals from groups in **View/Edit Groups**. You can also add multiple records to a class, delete all records from a class, or transfer individuals from one class to another class. You can also perform a search and generate reports, labels, and graphs based on attendance information.

Ready to get started? Click on a link below or enter a term in the search box.

Attendance Startup Outline

The Attendance module is designed to provide you with a complete system of enrolling individuals in classes and activities, tracking, and reporting attendance. This module can pull names, addresses, and other personal information from the People module, or you can add them directly through Attendance.

There are three levels of Attendance groups that differ by the level of detail you can capture. For a description of the different levels, read Working with Attendance Groups.

Here are some general steps for starting the Attendance module:

1. Read and understand the Attendance Weekly Procedures.
2. Understand the difference between the three Attendance levels. See Working with Attendance Groups for more information on the types of Attendance groups.
3. Create your groups.
4. Add individuals to classes or activities.
5. Mark and post Attendance.
6. Print any reports that you require.

Attendance Weekly Procedures

Use these procedures for reference when you are familiar with the Attendance options but are not sure in what order to use them during weekly use.

1. Before classes meet, print the Attendance Marking Sheets.
2. Distribute them to the appropriate individuals and/or classrooms.
3. Gather Attendance Marking Sheets after they are filled out.
4. Add any new individuals (members, prospects, etc.) to ACS in the People module.
5. Make any necessary changes/additions to classes.
6. Mark and post class attendance for the week.
7. Print any reports, labels, cards, etc., that you may need.
8. Print Attendance marking forms for the next meeting.

Working with Attendance Groups

A Group describes the structure of classes or events you set up in Attendance. There are four types of groups: master groups, division groups, department groups, and roster groups.

- **Master Groups** — The master group is the topmost level of your class structuring.

- **Division Groups** — Creating a division group gives you another level of detail when setting up classes. A Division Group falls under a Master Group. Examples of Division Groups would be an adult division, and a youth division under the Master Group of Bible Study Wednesday.

- **Department Groups** — Creating a department group gives you another level of detail when setting up classes. A Department Group falls under a Division Group. Examples of Department Groups would be a Sr. High and Jr. High department under the youth division - division level group.

- **Roster Groups** (Classes) — Creating a Roster Group gives you another level of detail when setting up classes. You can set up a Roster Group below a Master Group or Department type intermediate group. The Roster Level Groups are the actual classes. Examples of Roster Groups would be 9th Grade, 10th Grade, 11th Grade, and 12th Grade classes under the Sr. High Youth Department.

Setting up Attendance Groups

On the Group Setup menu, you can add, edit, or delete existing groups, and arrange the way they display in drop-down lists. Here are the different types of Attendance groups you can create.

- Creating a Master Group – The master group is the topmost level of your class structure.

- Creating a Division Group – Creating a division group gives you another level of detail when setting up classes. A Division Group falls under a Master Group. Examples of Division Groups would be an adult division, and a youth division under the Master Group of Bible Study Wednesday.

- Creating a Department Group – Creating a department group gives you another level of detail when setting up classes. A Department Group falls under a Division Group. Examples of Department Groups would be a Sr. High and Jr. High department under the youth division - division level group.

- Creating a Roster Group – Creating a roster group gives you another level of detail when setting up classes. You can set up a roster group below a master group or department type group. The roster level groups are the actual classes. Examples of roster groups include 9th grade, 10th grade, 11th grade, and 12th grade classes under the Sr. High Youth Department.

Additional Field Descriptions

Group Type
Select to display **Class/Worship**, **Activity**, or **Small Groups** (if you have Access ACS).

Groups Tab
Select this tab to add, edit, delete, or sort groups.

- **Master Groups** — Select a master group from the drop-down menu. Only the groups the user has rights to display.
- **Collapse** — Select to contract the displayed Master Group. This can be helpful when you are not sure what Master Group a particular roster group is under and want to quickly view roster levels. When a Master Group is collapsed, the Expand option becomes available, and when selected, returns the Master Group to the original view.
- **Copy Group** — Click to copy a master group and all its components. You can include rosters, dropped records, and deactivated groups. You can also rename the master group. When you copy a group, the start date is the same as the original. You can change the start date until you add people to the roster groups.
- **Copy Rosters** — Click to copy rosters from one group to another.
- **Print** — Click to print details of the groups you set up. For example, all the information from the list and element options you created will print.
- **Print All** — Click to print the details for all groups within the master group.

Options Tab
Select this tab to choose the way names display on certain Attendance or Activity windows, and how the names display on the reports printed from those windows.

Creating a Master Group

In the Group Setup window, you set up Master Groups, which are the top most level of a group structure.

After creating the master group and intermediate levels, make sure you have entered your structure correctly. You can right-click and select **Customize** to display all of the fields you want in the grid. Then right-click and select **Print Grid** to print the selected fields and group structure.

˅ To create a Master Group

1. Under Advanced Tools, click the **Settings** tab.

2. In the drop-down list, select **Groups**, and then click **Go** ➡.
3. In the **Group Type** drop-down list, select **Class/Worship**.
4. Click **Add**, and then click **Add Master Group**.
5. Select a **Class level** or **Worship**, and then click **OK**.
6. The Group Setup window displays. Under **Group Name**, enter a group name.
7. On the **Levels, Settings**, **Reserve List**, and **Marking Fields** tabs, select any options you want to use, then click **Next**.
8. The **Finish** tab includes a summary of the new master group. To edit a tab, click **Back**. Otherwise, click **Finish**.

Additional Field Information

Levels

Master Level Name, Level 1, 2, and 3 Name — By default, the level names are division, department, and class, but you can change them here.

Settings

- **Group Options —** In this area, your group's start date displays. You can select to use comments, quick codes, or locations. If you use locations, you can opt to allow multiple locations per class (for example, if a class meets in different rooms depending on the day.
- **Enter/Post Options —** Here, you can select marking options, such as detail or summary. You can also select to Mark Associates or Prospects. Associates are marked when you drop someone from a class.
- **Roster Options —** Select **Auto View Roster** to display your roster automatically when working in a group.
- **Roster Order —** Select to order your roster by last name or by position, then last name.
- **Roster Status —** In the description fields, enter or edit roster statuses. By default, the statuses are **Enrolled** an d **Class Prospect**, but you can change them if you want.

Reserve List

Use List 1, 2, 3, 4, and 5 — Here, you can set up Lists 2-5 (List 1, Position, is set up at the Master Level). You can select to define options at the master level or require them.

Marking Fields

- **Field Types** — Select **Detail** or **Summary** to set up marking fields. Detail Marking Fields are assigned to individuals in Sunday School groups and Activity groups. Summary Marking Fields are assigned to Worship Groups and classes in Sunday School groups.
- **Data Types** — When setting up fields, you can use **Yes/No**, **Integer** (number), or **Currency** data types.
- **Columns** — The **Field Name**, **Data Type**, and **Head Count** display.

Setting up Summary Marking Fields

In Master Groups, you can set up Summary Marking Fields to enter a head count for individuals present. This posts a head count without the individuals' names.

To set up summary marking fields

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups**, and then click **Go** .
3. In the Group Setup window, select the **Master Group** you want to add marking fields for, then click **Edit**.
4. When the Edit Group window displays, click **Master Settings**.
5. On the **Marking Fields** tab, under **Field Types**, select **Summary**.
6. Click **Add**. The Add window displays.
7. In the **Field Name** field, enter a name for the marking field.
8. In the **Data Type** field, select **Integer**.
9. To account for the field in custom totals, select **Add to HeadCount**. You must select this option to include the visitor count on the Individual Attendance Summary report.
10. To add additional fields, select **Add Another**.
11. Before closing the Master Settings window, on the **Settings** tab, ensure **Mark Summary** is selected.
12. Click **OK**.

To use marking fields

1. In **Enter/Post Attendance**, select the **Master Group**, then **Class** that you added the Summary Field to.
2. Select the **Summary** tab.
3. Enter the data into the **Summary Field**.
4. Continue posting as normal.

Creating a Division Group

In the Group Setup window, you can set up a division group below a Master group.

Creating a Division Group gives you another level of detail when setting up classes. Examples of Division Groups would be an adult division, and a youth division under the Master Group of Wednesday Bible Study.

Division Groups are only available for Class 3 Levels Master Groups. If you think adding Division Groups is a good idea, begin with a Class 3 Level Master Group setup.

> ⊘ **Tip**
>
> You can move a class into a different division by setting up a new division group, then transferring the individuals from the other class into the new one.

˅ To create a division group

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** ➡.
3. In the data-tree, select the **Class 3 Level Master Group** that you want to create a division group for.
4. Click **Add** and then select **Add Division**.
5. In the **Group Name** field, enter a name for the division.
6. **Optional**: Add a **Comment** for the division.
7. **Optional**: Select **Add Another** to add another division.
8. Click **OK**.

Creating a Department Group

In the Group Setup window, you can set up a Department group below a Division group.

Creating a department group gives you another level of detail when setting up classes. Examples of department groups would be a Sr. High and Jr. High department under the Youth Division division level group.

> ⓘ **About Department Groups**
>
> Department groups are only available for Class 2 Level and Class 3 Level Master Groups. If you think adding Department groups meets your needs, begin with a Class 2 Level or Class 3 Level Master Group setup.

˅ To create a department group

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Select **Class 2 Levels** or **Class 3 Levels Master Group** in the data-tree area that you want to create a department group for.
4. Click **Add** and select **Add Department**.
5. In the **Group Name** field, enter a name for the department.
6. **Optional**: Add a **Comment** for the department.
7. **Optional**: Select **Add Another** to add another department.
8. When finished, click **OK**.

Creating a Roster Group

In the Group Setup window, you can set up a Roster Group below a Master Group or department type Intermediate Group. The Roster Level groups are the actual classes. Examples of Roster Groups would be a 9th Grade, 10th Grade, 11th Grade, and 12th Grade under the Sr. High Youth Department.

˅ To create a Roster Group

1. Under Advanced Tools, click the **Settings** tab.
2. Select **Groups** from the drop-down list and click **Go** .
3. Select the **Master Group** or **Department Type Intermediate Group** in the data-tree area that you want to create a roster group for.
4. Click **Add** and select **Add Class**.
5. In the **Group Name** field, enter a name for the class.
6. **Optional**: On the **General**, **Roster**, **Attributes**, and **Master Settings** tabs, select the appropriate options.
7. **Optional**: To add another class, select **Add Another**.
8. Click **OK**.

Additional Field Information

When creating your roster group, you can enter information on the tabs described below.

General
Enter a comment about the roster group.

Roster
Enter a quick code and a location description. If you selected **Allow Multiple Locations per Class** during the master group setup, enter multiple locations for the class, along with the maximum number of individuals allowed in each location.

Attributes
Click **Include Age Range For Roster**, then enter a range of years and/or months to define the age range for the roster. If you want to be able to assign a roster based on a person's date of birth in Checkpoint, you must enter this information for each of those rosters.

Master Settings
Select any additional options for the class.

Editing Attendance Groups

Once you've set up attendance groups, you can edit them if you need to. Editing attendance groups lets you change the group name, deactivate the group, or select other settings. You can add group events and positions, select to include the age range on rosters, and work with your group's levels of structure.

To edit attendance groups

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups**, then click **Go** .
3. In the **Group Type** and **Master Groups** drop-down lists, select the appropriate group type and master group to find the group you want to edit.
4. In the list of groups, select the group you want to edit, then click **Edit**.
5. In the Edit Group window, on the **Settings**, **Lists**, and **Group Levels** tabs, select the appropriate options. You can read more about each option below.
6. When finished, click **OK** to save your changes.

You can also edit your master group's settings.

To edit master group settings

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups**, then click **Go** .
3. In the **Group Type** and **Master Groups** drop-down lists, select the appropriate group type and master group you want to edit.
4. In the list of groups, select the group you want to edit, then click **Edit**.
5. In the Edit Group window, click **Master Settings**.
6. On the **Levels, Settings, Reserve List**, and **Marking Fields** tabs, select the appropriate options. To read more about them, see Creating a Master Group.
7. When finished, click **OK**.

Additional Field Information

Group Name — In this field, you can edit the group name if necessary.

Inactive — To deactivate your group, select this option. If the group has active roster records, you must confirm deactivating it.

Allow Rosters — To allow rosters, select this option.

The Settings Tab — On this tab, you can edit roster details and other group attributes such as age range.

- **Roster —** On this tab, you can edit the class location and description. This tab only displays for classes, not departments or divisions.
- **Attributes —** Under **Age Range**, select **Include Age Range for Roster**, then enter an age range. If you want to use months, select **Enter Months**. This is helpful if your class is for young children and you want to specify a class for children 0-3 months or 12-18 months. In Checkpoint Setup, you can select an option to **Assign Roster based on Date of Birth**. This option works with the age ranges used here.

The Lists Tab — Here, you can add, edit, or delete events and positions. You can also reorder events and positions using the **Move Up** and **Move Down** buttons, or you can print a list or events or positions for the group. To get started, under **Lists**, select **Events** or **Positions**.

The Group Levels Tab — Here, you can add divisions, departments, and classes to groups, as well as reorder the group structure or print a list of group levels. For divisions and departments, you can edit the group's settings (age range) or levels. When editing classes, you can also edit roster information such as the class location.

Adding or Editing Attendance Lists

In Add/Edit Lists window you can add, edit, delete, sort, or print events and positions. This option works the same as the **Lists** tab in the Edit Group window.

To add list items through Add/Edit Lists

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Select a master group and then click **Add/Edit Lists**.
4. In the List Items window, select **Events** or **Positions**, then click **Add**.
5. In the Add window, enter the new event or position.
6. **Optional:** Select **Add Another** to add another event or position.
7. Click **OK**.

To edit list items through Add/Edit Lists

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Select a master group and then click **Add/Edit Lists**.
4. In the List Items window, select **Events** or **Positions**, then click **Edit**.
5. In the Edit window, edit the event or position, then click **OK**.

Copying an Attendance Group

In Attendance, you can copy a master group and all its components. You can include rosters, dropped records, and deactivated groups. You can also rename the master group.

When you copy a group, the start date is the same as the original. You can change the Start Date until you add people to the roster groups. If you select to Copy Rosters, you cannot change the start date.

In Worship groups, you can change the start date until you post markings in it. You can also change the parent group in classes and worship groups.

Copy Group does not copy Member Status and Record Type selection, so all records display in Enter/Post Attendance until you set up a Filter on the records. Marking Fields are not copied.

˅ To copy a group

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Select the **Group Type** for the group you want to copy.
4. Select the **Master Group** to copy.
5. Click **Copy Group**. The Copy Group window displays.
6. In the **Master Group Name** field, enter the name of the new group.
   - To copy deactivated groups, select **Copy Deactivated Groups**.
   - To copy rosters, select **Copy Rosters**.
   - To copy dropped rosters, select **Include Dropped Rosters**.
7. Click **OK**.

Changing a Parent Group

In the Change Parent window, you can move a class to a different department or division. You can also move a department to a different division, but you cannot move divisions.

˅ To change a parent group

1. Under Advanced Tools, click the **Settings** tab.

2. Select **Groups** from the drop-down list and click **Go** ⊕.
3. In the Group Setup window, select a master group.
4. Click **Change Parent**. The Change Parent window displays.
   - In the **Locate** field, enter the **Quick Code** for the class or department.
   - To make deactivated classes or departments available, select **Show Deactivated**.
5. In the left pane, select the class or department you want to move.
6. In the right pane, select the department or division into which you want to move the selected class or department.
7. Click **OK**.

Copying Rosters

The Copy Rosters window displays a structured list of classes or categories. You can copy rosters from one group to another.

˅ To copy rosters

1. Under Advanced Tools, click the **Settings** tab.
2. Select **Groups** from the drop-down list. Click **Go** .
3. In the Group Setup window, click **Copy Rosters**.
4. In the Copy Rosters window, select the **Original Effective Date** to copy rosters as of a certain date and the **New Effective Date** for the new rosters.
5. Under **Source**, select the **Master Group** you want to copy rosters from.
6. In the left tree structure, select the class or category with the roster you want to copy. To choose classes or categories, select **Filter Source Lists**, and under **List Filter**, select the item to filter the roster for.
7. Under **Destination**, select the **Master Group** you want to copy rosters to.
8. In the right tree structure, select the class or category to which you want to copy a roster. To do this, select **Choose New List Values** and under **List Values**, choose the new value you want for the item selected in List Filter.
9. Click **Copy**.
10. When the confirmation message displays, click **Yes**, then **Close**.

Additional Field Descriptions

Original Effective Date
Select to copy rosters as of a specific date.

New Effective Date
Select the date to be the Date Added on the new rosters.

Source

- **Master Group** — Select the master group from which you want to copy rosters.
- **Locate** — Enter a Quick Code to easily locate a specific class or category.
- **Show Deactivated** — Select to show deactivated groups in the structured list.
- **Filter Source Lists** — Select to copy only certain individuals meeting the criteria you select in List Filter.
- **List Filter** — Select the list filter to copy to the destination master group.

Destination

- **Master Group** — Select the master group you want to copy rosters to.
- **Locate** — Enter a Quick Code to easily locate a specific class or category.
- **Show Deactivated** — Select to show deactivated groups in the structured list.
- **Choose New List Values** — Select to give new values to the Filter Source positions you copy from the source master group. If you don't have this selected, the positions will be the same as the group you copy.
- **List Values** — Select the new value for the position selected from the source master group.

Updating the Date Last Attended in Attendance

In Groups Setup, you can update the Date Last Attended. This is helpful if some individuals do not have a Date Last Attended on their profile.

> ⚠️ **Perform a Backup**
>
> Since updating the Date Last Attended changes many records, we recommend performing a manual data backup before continuing.

˅ To update the date last attended

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** ➡️ .
3. In the Groups Setup window, in the **Group Type** and **Master Groups** drop-down lists, select the appropriate options to access the group you want to update.
4. Select the group you want to update attendance for, then click **Maintenance**.
5. Under Items, select **Update Date Last Attended**, then click **Start**.
6. When the confirmation message displays, click **Yes**.

Clearing Deleted Roster Records from the Roster Changes List

You can clear deleted roster records from the Roster Changes List. This lets you delete elements from List fields that are no longer used or after removing an individual's activities. If you receive errors when trying to delete a class, you may need to clear the deleted rosters (the class still has dropped or deleted individuals attached).

To clear deleted roster records

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. Select the group you want to clear deleted roster records from, then click **Maintenance**.
4. Under **Items**, select **Clear Deleted Rosters**.
5. Under **Options**, select whether to **Clear All** deleted roster records or only those for a specific **Date Range**.
6. Click **Start**.
7. To delete roster records for the selected date range, click **Yes**.

Deleting Attendance Groups

You can delete an attendance group if you need to or if one is created in error. If you delete a group, all data and markings are deleted.

To delete an attendance group

1. Under Advanced Tools, click the **Settings** tab.

2. On the drop-down list, select **Groups**, and then click **Go** .
3. Select the group you want to delete, then click **Delete**.
4. When the confirmation message displays, click **Yes**.

Deleting Attendance Markings for an Attendance Year

You can delete attendance markings (present and absent) for a selected attendance year.

To delete attendance markings for a year

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go**.
3. Select the group you want to delete markings from, then click **Maintenance**.
4. Under **Items**, select **Clear Markings**.
5. Under **Options**, select the year for which you want to clear attendance markings, then click **Start**.
6. When the confirmation message displays, click **Yes**.

Reordering Attendance Groups

In the Reorder window, you can sort master groups manually or use the **Alpha Sort** option.

To reorder groups

1. Under Advanced Options, click the **Settings** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In Group Setup, click **Reorder**. The Order Groups window displays.
4. Under **Group**, select a group to move.
5. Click **Move Up** or **Move Down**. Repeat this step until the groups are ordered the way you want.
6. **Optional:** Click **Alpha Sort** to put all the groups in alphabetical order.
7. When finished, click **OK**.

Working with Elements

Elements can help you narrow down the specific focus of your groups, helping you to keep your departments and classes tailored to the needs of your organization. You can add elements to your reserve list. The reserve list entries display when you are on the View/Edit Groups window or the Roster Entry window.

You can also add an element through the Add/Edit Lists option in the Group Setup window. You can also edit or delete elements.

To add element list items
1. Under Advanced Tools, click the **Groups** tab.
2. In the drop-down list, select **Groups**, then click **Go** .
3. In the **Group Type** drop-down list, select Class/Worship.
4. In the **Master Groups** drop-down list, select the Master Group whose reserve list you want to add elements to.
5. In the grid area, select the Master Group title, then click **Edit**. The Edit Group window displays.
6. Click the **Lists** tab, select the Element that you want to add list items to, and click **Add**.
7. Enter a description for the list item and click **OK**.

> ⓘ **Useful Information**
>
> If you are going to be adding several list items, select **Add Another** to make the task faster.

To edit an element list item
1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups**, then click **Go** .
3. In the **Group Type** drop-down list, select Class/Worship.
4. In the **Master Groups** drop-down list, select the Master Group whose element list items you want to edit.
5. In the grid area, select the Master Group title, then click **Edit**.
6. Click on the **Lists** tab, then select the **Element** and list item you want to edit and click **Edit**.
7. Enter a different description for the list item and click **OK**.

To delete an element list item
1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups**, then click **Go** .
3. In the **Group Type** drop-down list, select Class/Worship.
4. In the **Master Groups** drop-down list, select the Master Group for the class whose element list items you want to edit.
5. In the grid area, select the class, then click **Edit**.
6. Click on the **Lists** tab.
7. Select the Element that has the list items you want to delete, then choose the list item you want to delete.
8. Click **Delete**.
9. When the confirmation message displays, click **Yes**.

Alphabetizing the Element List Items

You can alphabetize the list items that display for an element. To manually order the Element list items, see the topic Manually Ordering Element List Items.

ˇ To alphabetize the element list items

1. Under Advanced Tools, click the **Groups** tab.
2. In the drop-down list, select **Groups** and click **Go** .
3. In the grid area, select the **Group Type** and **Master Group**.
4. Select the **Category** or **Division/Department/Class** that contains the element list items you want to alphabetize, then click **Add/Edit Lists**.
5. Under Fields, click the **Element** that contains the list items you want to alphabetize.
6. Click **Alpha Sort**.

Manually Ordering Element List Items

You can manually order element list items. Ordering an Element List item can also be done through the Add/Edit Lists option in the Group Setup window.

To automatically alphabetize the element list items, see Alphabetizing the Element List Items.

˅ To manually order element list items

1. Under Advanced Tools, click the **Settings** tab.
2. In the drop-down list, select **Groups*and click *Go** ➡ .
3. In the grid area, select the master group whose element list items you want order, then click **Edit**.
4. In the Edit Group window, click the **Lists** tab.
5. Click the **Element** you want to order.
6. Select the element list item you want to order and click **Move Up** or **Move Down** to place it where you want it to display in the list.
7. Continue to move the element list items until they are where you want them to display in the list.

Adding or Editing Individuals in Attendance

You can add, edit or delete individuals in the Attendance module. The Add/Edit Individual option lets you establish, view, and/or change an individual's attendance class information. You can also work with all of an individual's Attendance class records at a time.

The Add/Edit Individual option is only available with the Attendance Classes Group Type. Individuals must have a record in the People module in order to create an attendance record.

˅ To add an individual's attendance record

1. Under Manage Records, click the **Groups** tab.

2. In the drop-down list, select **Add Individual to a Group** and click **Go** .
3. Select the individual you want to add an attendance record for, and then click **View/Edit**.
4. On the **Groups tab**, select the **Classes** sub tab and click **Add** or **Quick Entry**. The New Roster window displays.
5. Enter all necessary information and click **OK**. When you add an individual to a class, they only show up for the effective date forward. This helps you obtain historical information on your classes.

˅ To edit an individual's attendance record

1. Under Manage Records, click the **People** tab.

2. In the drop-down list, select **View/Edit Individual** and click **Go** . The Find Person window displays.
3. Select the individual whose attendance record you want to edit and click **View/Edit**.
4. Click on the **Groups** tab, and then click the **Classes** sub tab.
5. In the Detail Area, select the class you want to edit and then click **Edit**. The Edit Roster window displays.
6. Edit all necessary information and click **OK**.

˅ To delete an individual's attendance record

1. Under Manage Records, click the **People** tab.

2. In the drop-down list, select **View/Edit Individual** and click **Go** . The Find Person window displays.
3. Select the individual for whom you want to delete an attendance record and click **View/Edit**.
4. Click the **Groups** tab, and then click the **Classes** sub tab.
5. In the Detail Area, select the class for the record you want to delete, and then click **Delete**.
6. When the confirmation message displays, click **Yes** to delete the attendance record. Deleting an individual's attendance record deletes their markings as well.

Additional Field Descriptions

You can use the New Roster window to assign an individual to a class. The New Roster window displays when you click Add. When you click Transfer, the Transfer Roster window displays.

- **Master Group** — This field displays all the master groups levels you have created. Select the group that the individual is participating in from the drop-down list.
- **Effective Date** — Displays the date the new roster or any changes becomes effective.
- **Date Last Changed** —This field displays when editing a roster and gives the last date that an entry was modified. The date is automatically calculated.
- **Locate** — If you have entered a quick code for a class, you can enter it in this field to quickly select the activity from the data-tree list. You can also enter the group name.
- **Show Deactivated** — Select if you want to include records that have been deactivated.
- **Group** — This field displays the selected group.
- **Primary** — Select to mark the class as primary for the individual. The primary record is the class that an individual attends most of the time and plans to devote the majority of their time towards.
- **Select People** — Select to add or transfer records after choosing all appropriate options.

General Fields

- **Status** — Select the status for the record you are adding or transferring.
- **Position** — Select the position for the record you are adding or transferring.

Activation Dates

- **Date Added** — This field displays the date that the individual was added to the roster. The date is automatically calculated.
- **Date Dropped** — This field displays the date that the individual was removed from the roster. The date is automatically calculated.

Attendance Quick Entry

The Quick Entry feature is available from the Groups tab for an individual record. With Quick Entry, you can:

- Enroll someone quickly in multiple classes
- Mark their status for a class
- See all the elements for a class at one time

You can add new element list items and new positions by clicking in the list box and then holding CTRL and pressing Insert on your keyboard. You cannot add new categories or elements from Quick Entry, so create the options in Setup first.

˅ To access Quick Entry

1. Under Manage Records, click the **Groups** tab.
2. In the drop-down list, select **Add Individual to a Group** and click **Go** .
3. Select the individual you want to mark attendance for, and then click **View/Edit**.
4. On the **Groups** tab, click **Quick Entry**.

Additional Field Descriptions

- **Master Group** — From the drop-down list, select the Class that the individual is participating in.
- **Locate** — Type in the name of the class, or Quick-Code if you have entered one, to quickly select the class from the data-tree.
- **Show Deactivated** — Select to show deactivated groups.
- **Position** — Select the position you want to add the member as.

Status

- **Status Description 1 or 2** — Select if you want to enter the individual as Status Description 1 or 2. You can edit the status description on the Master Group - Master tab in Setup.
- **Primary** — Select if you are entering the class as the individual's primary class.
- **Date Added** — This field displays the date that an individual was added to a class.
- **Date Last Changed** — This field displays the date that an activity entry was modified.
- **Effective Date** — This field displays the date that any edits become effective. This date can be modified on the Groups tab for the individual.
- **Overall Date Last Attended** — This displays the date of when the individual last attended the activity or class.

Printing from the Groups Tab

You can access the printing options on the Groups tab by right-clicking in the grid.

˅ To Print from the Groups tab

1. Under Manage Records, click the **People** tab.
2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual whose information you want to view and click **View/Edit**.
4. Click the **Groups** tab, and then click the **Activities** or **Classes** sub tab.
5. Right-click on the grid area and select **Print List**, **Print Detail**, **Print Label**, or **Print Grid**.

Report	Description
List	Prints a report that includes the roster group or class the individual is currently enrolled in, in addition to element details.
Detail	Prints a report that includes the roster groups or classes the individual is enrolled in, and dates for when they were added, modified, or removed from a roster group or class. The date the individual last attended a roster group or class is also printed.
Label	Prints a label that displays the name of the individual and the roster group or class selected. The name of the individual will display according to the Name Options selected from the Options tab in Group Setup. Labels printed from the Classes tab only print on 1 1/8" by 3 1/2" Labelwriter Address Labels.
Grid	Prints the grid as it displays on screen.

Transferring Individuals from One Class to Another

From time to time, you may need to transfer individuals in your organization from one class to another class.

˅ To move an individual from one class to another

1. Under Manage Records, click the **People** tab.

2. In the drop-down list, select **View/Edit Individual** and click **Go** .
3. Select the individual you want to transfer and click **View/Edit**.
4. Click on the **Groups** tab, and then click on the **Classes** sub tab.
5. Select the class you want to move the individual from and click **Edit**.
6. Enter the new class information that the individual is transferring to and click **OK**.

Entering or Posting Attendance

In Enter/Post Attendance, you can enter and post your attendance markings to keep detailed records of your members' and visitors' involvement.

Attendance Marking Options

You can use several methods when selecting individuals to mark for attendance. Using your mouse, keyboard shortcuts, or keyboard/mouse combinations can make marking faster when working with many individuals.

When **Return to Locate** is not selected in Group Setup, you can use the options below to mark attendance.

- Select the individual and press **ENTER** on your keyboard.
- Double-click the selected individual.
- Select the individual and press the **SPACEBAR** on your keyboard.
- Use a bar code scanner. You must still mark non-enrolled individuals manually if you use a bar code scanner to mark attendance.
- Select several people at one time by holding the **CTRL** key on your keyboard and using your mouse to select individuals. Press **ENTER** on your keyboard to mark them.
- Mark an entire family present by selecting one individual in the family and then pressing **CTRL+ENTER** on the keyboard.
- Select multiple families by holding the **CTRL** key on your keyboard and using your mouse to select one individual in each family, and then press **CTRL+ENTER** to mark everyone in those families present.
- Mark communion for one person by highlighting the individual, holding the SHIFT key down, and pressing **ENTER** on your keyboard.
- Mark communion for a whole family by selecting one individual in the family, and then pressing **CTRL+SHIFT+ENTER** on your keyboard.
- Select multiple families by holding the **CTRL** key on your keyboard and using your mouse to select one individual in each family, and then press **CTRL+SHIFT+ENTER** to mark communion for everyone in those families.
- Select multiple individuals by using your mouse to select one individual, then pressing **SHIFT** and double-clicking on the last individual you want to mark. This will mark the two individuals you selected and everyone in between. For Sunday School and Worship, if you are not marking Communion, this will mark the individuals as present. If you are marking Communion, this will mark the individuals communion. For Activity groups, it will mark the individuals present.

When **Return to Locate** is selected in Group Setup, you can locate individuals by name to mark them. To locate individuals by name, type their name in the **Locate** field, press **CTRL+DOWN ARROW** to select their name in the grid, and use the **UP ARROW** and **DOWN ARROW** keys to move between individuals. Then use one of the keyboard shortcuts below to mark the individual present.

- **CTRL+M** to mark someone present or absent.
- **CTRL+C** to mark someone as Communion.
- **ALT+N** to mark Non-Enrolled.

After marking an individual, the cursor returns to the **Locate** field where you can enter another name. To move between records, use **CTRL+DOWN ARROW** to scroll through all of the individuals with the same last name as the one you typed in the **Locate** field.

> ⓘ **Useful Information**
>
> If you need to type a **%** (percent sign) in the **Locate** field, first select **Disable Bar Codes**. If you do not select **Disable Bar Codes**, the program will not allow you to type the **%** in the **Locate** field.
>
> Some options may not be available for certain groups - for example, some groups don't mark Communion.

Marking Attendance

In the Mark Attendance window, you can select a roster and mark attendance for individuals who are enrolled in it. If someone is present for a roster but not enrolled, it is also possible to mark attendance on this window as non-enrolled.

Depending on the master group you select, all areas may not display. You must also save markings before you can post to additional rosters within the same master group.

> ⊘ **Tip**
>
> You can right-click within the Marking Grid to customize the fields that display, mark detail, print the Proof List, and view an individual's record.

⌄ To enter and post attendance for Attendance Classes

1. Under Manage Records, click on the **Involvement** tab.

2. Select **Enter/Post Attendance** from the drop-down list, then click **Go** ➡.

3. In the **Master Group** drop-down list, select the **Master Group** that has the activity or class that you want to post attendance for.
4. Select the class that you are marking attendance for. Notice that the roster area on the detail tab changes to reflect the selected class.
5. In the **Event** drop-down list, select the event you want to post attendance for.
6. In the **Posting Date** drop-down list, select the **Posting Date** you want to mark attendance for. The default date is the current system date.
7. Select the individual and press **Enter** to mark individuals either present or absent. An individual can only have one primary class per master group.
8. Enter all other appropriate information in the Enter/Post Attendance window.
9. When you have finished marking attendance, click **Post**.
10. Continue to enter and post class attendance for the remaining classes, then click **Close**.

⌄ To enter and post attendance for Worship Services

1. Under Manage Records, click on the **Involvement** tab.

2. Select **Enter/Post Attendance** from the drop-down list and click **Go** ➡.

3. In the **Master Group** drop-down list, select the worship service master group you want to mark attendance for.
4. In the **Event** drop-down list, select the service that you are marking attendance for. Notice that the roster area on the detail tab may change to reflect the selected class.
5. In the **Posting Date** drop-down list, select the **Posting Date** you want to mark attendance for. The default date is the current system date.
6. Select the individual and press **Enter** to mark individuals either present or absent.
7. Enter all other appropriate information on the Enter/Post Attendance window. For details see the topic **Mark Attendance**.
8. When you finish marking attendance for the entire class, click **Post**.
9. Continue to enter and post class attendance for all remaining classes. When finished, click **Close**.

⌄ To enter and post Attendance for an Activity Group

1. Under Manage Records, click on the **Involvement** tab.

2. In the drop-down list, select **Enter/Post Attendance** and click **Go** ➡.

3. In the **Master Group** drop-down list, select the activity master group you want to mark attendance for.
4. In the **Event** drop-down list, select the activity that you are marking attendance for. Notice that the roster area on the detail tab may change to reflect the selected class.
5. In the **Posting Date** drop-down list, select the **Posting Date** you want to mark attendance for. The default date is the current system date.
6. Select the individual and press **Enter** to mark individuals either present or absent.
7. Enter all other appropriate information on the **Enter/Post Attendance** window.
8. When you finish marking attendance for the entire class, click **Post**.
9. Continue to enter and post class attendance for all remaining classes, then click **Close**.

Additional Field Descriptions

Master Group
Click the drop-down list to select the master group you want to mark attendance for.

Locate
If you entered a quick code when you created the roster, enter it here. The roster highlights in the data tree area.

All Levels
Select to mark attendance for all levels of the master group.

Show Deactivated
Select to show deactivated sub-levels or rosters in the selected master group. If you select this option, deactivated master groups also display in the Master Groups drop-down list.

Event
If you set up several events within a master group, this field displays the selected event or roster. To select the event, click the drop-down list.

Posting Date
Displays the date attendance is posted. The default date is the previous Sunday. To enter a date from the calendar, click the down arrow.

Present
Use this when the majority of your students are absent. To mark an individual present, under **Mark**, select **Present**. In the grid, double-click the individual.

Absent
Use this when the majority of your students are present. To mark an individual absent, under **Mark**, select **Absent**. In the grid, double-click the individual. After you change an individual's marking, you cannot change the way you are posting until you post that current class, then change dates.

Disable Barcode
Select to turn off the ability to mark attendance using a bar code scanner. The Scan Barcode field does not display when you select **Disable Barcode**.

Use Marking Colors
Select to turn on marking colors. Individuals marked absent display in red; individuals marked present display in blue.

Total Present
Displays the total number of individuals present for the selected roster. This number includes summary fields labeled Add to Head Count.

Total Absent
Displays the total number of individuals absent for the selected roster.

Clearing Attendance

In Enter/Post Attendance, you can clear attendance. This clears your markings for the posting date and group, which lets you start over for that particular date. No markings are saved.

To clear attendance

1. Under Manage Records, click on the **Involvement** tab.

2. Select **Enter/Post Attendance** from the drop-down list, then click **Go** .

3. In the **Master Group** drop-down list, select the group you want to clear attendance for.

4. When the group displays in the marking grid, click **Clear.**

Marking Attendance for Non-Enrolled Individuals

You can mark attendance for individuals who have a record in People but who are not enrolled in a class. This option displays on the roster level (not on the division or department level), and you cannot mark non-enrolled for a Worship group.

˅ To mark attendance for non-enrolled individuals

1. In the Mark Attendance window, select the group you want to mark attendance for.
2. Click **Mark Non-Enrolled**.
3. When the Find Person window displays, select the individual you want to mark attendance for, and then click **OK**.
4. Repeat steps 2 and 3 until you complete marking non-enrolled individuals for this group.

Importing Attendance Markings from a Text File

If you don't record attendance with a portable barcode scanner, but you want to import your attendance markings into ACS, you can use Notepad to create a text (.txt) file containing your attendance data.

For Sunday School groups and Activity groups, the text file should have one attendance line for each class or roster that the individual is marked for. Each line should contain the Master Group ID number, the Event ID number, and the individual's roster number for that class or roster.

For Worship groups, the text file should have one attendance line with the Master Group ID number, Event ID number, and the Barcode number of the person for each individual attending Worship.

Each attendance line in the text file should follow the format outlined in the table below:

Source	Format
Attendance/Activity Roster	~%9-digit master group#, %9-digit event#, %9-digit roster# For example: ~%000000073,%000000023,%000001646 ~%000000073,%000000023,%000001681
Worship	~%9-digit master group#, %9-digit event#, %9-digit BarCode# For example: ~%000000002,%000000020,%000000339 ~%000000002,%000000020,%000000131

⌄ To import and post attendance from a text file

1. Under Manage Records, click on the **Involvement** tab.
2. In the drop-down list, select **Enter/Post Attendance** and click **Go** .
3. Click **Import**.
4. Select **Export File**, and click **Next**.
5. Select your file, and click **Open**.
6. Verify your information, and click **Post**.

Recording Attendance with the Portable Bar Code Scanner

> ⚠️ **Note**
>
> The CPT-711 portable barcode scanner is no longer available.

You can record attendance markings using the CPT-711 portable barcode scanner. You can carry the portable barcode scanner to events, scan the Master Group and Event barcodes on your Marking Sheet, scan the barcodes for those individuals who are present for the event, and then upload your markings from the scanner to your workstation.

For example, to record attendance for your Worship service, you can print the Attendance Marking Sheet for your Worship group and scan each individual as they enter the church.

When uploading data to a workstation, you can upload data directly into ACS, or you can record attendance using your portable barcode scanner and your Marking Sheet, then import the data into ACS at your convenience. You must still mark Non-Enrolled individuals manually.

> ⓘ **When uploading data**
>
> The portable barcode scanner can only collect data for one day before the data must be uploaded. Make sure to upload data at the end of each day that you use the scanner.
>
> Your scanner ships with 2 batteries so you can begin scanning immediately. However, you should replace them with rechargeable batteries so your scanner holds a charge.

⌄ To record attendance with the portable barcode scanner

1. Press the Power key to turn the scanner on.
2. Press the 1 key to collect data.
3. On the Marking Sheet, scan the **Master Group** barcode. (To scan, press the yellow key on the scanner while pointing the scanner at the barcode.)
4. On the Marking Sheet, scan the **Event** barcode.
5. On the Marking Sheet, scan the barcode for each individual you wish to mark present. Do not scan barcodes for individuals you wish to mark absent.
6. When you are finished recording attendance for this group, press the **ESC** key on the scanner.
7. To record attendance for another event, repeat steps 2 through 6.

Uploading Data From the Portable Barcode Scanner

> ⚠ **Note**
>
> The CPT-711 portable barcode scanner is no longer available.

After recording attendance, you can upload data from the portable bar code scanner directly into ACS or into Notepad. After importing, you can choose to keep or delete the data.

˅ To upload data to ACS

1. Turn the scanner on by pressing the power button and place the scanner in the cradle.
2. Plug the keyboard cable that was supplied with the scanner into the scanner cradle. Open **ACS**.
3. Under Manage Records, click the **Involvement** tab.
4. Select **Enter/Post Attendance** from the drop-down list. Click **Go**.
5. Click **Import** > **Barcode Scanner** and click **Next**.
6. **Optional:** Select the element or elements to which you want to post your activities. You cannot post solely to Element 2.
7. Press **2** on the scanner to upload data. When uploading is complete, select the date you want this data posted to.
8. Select which group or groups you want to post for. If you want to post to some groups now and some later, select **Import** again and follow the rest of the steps to post the second set of groups. Click **Post**.

˅ To upload data into a Notepad document

1. Turn the scanner on by pressing the power key on the scanner and place it in the cradle, then plug the keyboard cable that came with the scanner into the scanner cradle.
2. Open **Notepad** and press **2** on the scanner to upload your data. The scanner will beep, display the message Transferring Done, and then display the Delete Data menu.

   > ⚠ **Note**
   >
   > Make sure that Notepad remains the active application on your workstation. If you try to work in another application, your data will be uploaded into that application instead of Notepad.

3. Save the file to your hard drive. Make sure to note the path and file name of the file, then open ACS.
4. Under Manage Records, click the **Involvement** tab.
   - Select **Enter/Post Attendance** from the drop-down list. Click **Go** > **Import**.
   - Select **Export File**, and then click **Next**.
   - **Optional:** Select the element or elements to which you wan to post your activities. You cannot post solely to Element 2.
5. Select the **Notepad** file you want to import. The Master Group, Event, and Rosters will display.
6. Select the date you want the data to post to.
7. Select which group or groups you want to post for. If you want to post to some groups now and some later, you will have to repeat steps 8 through 15 to post the second set of groups.
8. Click **Post**.

> ⓘ **Useful Information**
>
> The Notepad file contains the following information fields: **Master Group** and **Event**.

- If it is a worship group, the last field contains the number of each person's barcode.
- If it is a Sunday School type group or activity group, the last field contains the RosterID of that class.

Working with the Portable Attendance Barcode Scanner

> ⚠️ **Note**
>
> The CPT-711 portable barcode scanner is no longer available.

Can I use the same cable to hook up the Attendance scanner as I do for my Fixed Assets scanner?

No. You must use the provided keyboard wedge cable connected between the keyboard cable and the keyboard plug on the back of your computer or a USB adapter.

Can I use the same scanner to scan attendance that I use to mark fixed assets?

We strongly recommend using two separate scanners. Only one program can run on the scanner at a time, so we recommend a second scanner for marking fixed assets.

Can I use the scanner if I have not added individuals and classes into ACS?

No. You must set up your classes in Attendance Setup and print the barcode sheets.

When I try to import the information from the scanner into Attendance, the scanner says "connecting," but it never imports the file.

Verify the scanner is positioned correctly in the cradle. Then, on the scanner menu, select **Import** > **Bar Code Scanner** > **Option 2**. The data then imports to **Enter/Post Attendance**.

Printing an Attendance Proof List

You can print an Attendance Proof List to compare to your marking sheets.

If you have not posted Attendance yet, the Original column on the report is blank. If you have posted and made changes to the markings without re-posting, the Original column and the Mark column are different.

˅ To print the Proof List

1. Under Manage Records, click the **Involvement** tab.

2. In the drop-down list, select **Enter/Post Attendance**, then click **Go** .
3. Select the **Master Group**, **Category**, **Event**, and **Posting Date**.
4. Select the **Elements** to sort by. You only have an Element to sort by if you are working with an Activity.
5. Right-click in the Marking Grid, and then click **Print Proof List**.

Viewing or Editing Groups in Attendance

The View/Edit Groups window lets you perform a variety of functions involved with managing your groups, including:

- Viewing the roster for a group
- Transferring individuals between groups
- Adding an individual to a group
- Dropping individuals from a group
- Deleting individuals from a group

˅ To view or edit groups

1. Under Manage Records, click the **Groups** tab.
2. Click **Go** ➡.
3. Select a **Master Group** to view/edit.
4. Under **Effective Date**, select the effective date of the change you want to make or information you want to view.
5. To customize the information that displays in the Individual Information Grid, right-click in the grid and click **Customize**.

Additional Field Descriptions

Master Group
The Master Group is the top level label of the class or activity you constructed. Select the Master Group activity from the drop-down list. The construction of the Master Group affects what displays on the View/Edit Groups window. For example, if you elected to use elements for your roster levels, they will display.

Locate (Above the Roster field)
This field is a quick locate function to help you select a roster level. Enter all or some of the characters of the roster group and press Enter on your keyboard. The respective roster level is selected. If you created one, you can also use the roster Quick-Code here.

Show Deactivated
Select to show deactivated sub-levels or rosters in the selected master group. Deactivated master groups display in the hierarchy view.

Locate (Above the Individuals list)
This field is a quick locate function to help you select the individual you need. Enter the last name, comma, and first name, or enter the phone number of the individual and press Enter on your keyboard. The individual will be highlighted on the list.

To sort the names in the grid, click the header row of the field you want to sort by. To sort records in ascending order, click once. To sort records in descending order, click again. To automatically locate records that match the value you enter, click a field in the grid, then enter the first few letters of the record you want to find.

Effective Date
Displays the active date that you added, copied, transferred, or dropped an individual from a class. Records are considered added, copied, or transferred to a roster as of the effective date. Records are considered dropped or transferred from a roster on the day prior to the effective date.

Selected Records
This field displays the total number of individuals that are in the selected class according to the Position, Status, and Primary Flag selections you make.

Adding a Group of Individuals to a Class

In View/Edit Groups, you can add several individuals to a group at a time, delete all/any individuals in a group, or move an entire class. This is useful when you want to perform simple tasks with a group.

> ⚠ **Note**
>
> This option is only available when using an Attendance Class/Worship Group Type.

˅ To add a group of individuals to a class

1. Under Manage Records, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Class Groups** and click **Go** ➡.
3. In the **Master Group** drop-down list, select the Master Group where the class is listed.
4. Click **Filter** to select the appropriate information for **Position**, **Status**, and **Primary Flag**, for the individuals you are adding to the class. Click **OK**.
5. Under **Effective Date**, click the drop-down arrow and select the appropriate date for adding the individuals to a class, and then click **Add**.
6. In the New Roster window, select the **Status** and **Position**.
7. Click **Select People**.
8. In the left pane, select the individual you want to add to the class, and click **Add**. The individual displays in the right pane.
9. Continue selecting individuals in the left pane and adding them to the class until all the individuals you want to add to the class are selected, and then click **OK**.

Additional Field Information

Right-click in the left pane to access the **Collapse** and **Expand** options. Click **Collapse** to contract the displayed Master Group. This can be helpful when you are not sure what Master Group a particular roster group is under and need to quickly scroll through the levels. When a Master Group is collapsed, the **Expand** option becomes available, and when selected, returns the rosters in the left pane to the original view.

Individual Information Grid
Right-click on the Individual Information Grid to access the following options.

- **Filter** — Select to filter records based on Position, Status, and/or Primary Flag.
- **Add** — Click to add an individual to a class. This opens the New Roster window. You must select a position and status before you can add individuals to an attendance group.
- **Copy** — Click to copy an individual's information to another class. The individual's information is not removed from the first class.
- **Transfer** — Click to move an individual from one class to another or to another status within the same roster.
- **Drop** — Click to remove an individual from a class. The individual's information is removed from the View/Edit Groups window except for when they were actually in the class. The roster record and markings are retained.
- **Delete** — Click to delete an individual from a class. Their roster record and markings are not retained.
- **View/Edit** — Click to access the highlighted individual's record in the View/Edit option.
- **Print Detail** — Prints a listing of individuals in the selected class, including name, roster, and position.
- **Print List** — Prints a listing of individuals in the selected class, including name, address, and phone.
- **Print Grid** — Prints names and fields displayed on the Individual Information Grid. Because you can customize what displays in the grid, you can determine what prints in the grid.
- **Export to Excel** — Select to export the names and selected fields in the Individual Information Grid to Excel®. If you have grid alternate row color set in My Preferences, that color formatting is included in the Excel file layout.
- **Launch E-mail Client** — Click to send an e-mail to the individual selected in the roster.
- **Mass E-mail** — Click to send a mass e-mail to all individuals selected in the roster. If some individuals do not have an e-mail address, you are given the option to create a mail merge letter for them.
- **Send Letter and Send Letter (Organizations)** — Click to access the ACS Mail Merge option. All names and/or organizations in the grid are included in the mail merge.
- **Customize** — Click to customize the information that displays in the Individual Information Grid. For more complete information on customizing the grid, see About the Individual Information Grid Area.

- **Refresh Roster** — Click to refresh the roster. This is especially effective if you and another user are working in the same roster at the same time. To see what changes the other user made, click **Refresh Roster**. This button is only available if **Auto View Roster** is selected in the Master Group setup.
- **Filter** — Click to filter the records.
- **Position** — Select the position of the individuals you want to display in the individual area.
- **Status** — Select the status of the individuals you want to display in the individual area.
- **Primary Flag** — Select to filter individuals from the currently selected class, according to whether the class is marked primary.
- **View Roster** — Click to view roster information for the selections you made. This option is only available if **Auto View Roster** is not selected in the Master Group Setup.
- **Add** — Click to add an individual to a class. This opens the New Roster window. You must select a position and status before you can add individuals to an attendance group.
- **Transfer** — Click to move an individual from one class to another or to another status within the same roster. The **Edit** option is not available in Attendance. You must use the Transfer option because a transfer in and a transfer out transaction record is created for reporting purposes in Attendance.
- **Drop** — Click to drop an individual from a class. The individual's information is removed from the View/Edit Groups window except for when they were actually in the class. The roster record and markings are retained.
- **Delete** — Click to delete an individual from a class. Their roster record and markings are not retained.

Deleting Individuals From A Class

You can delete individuals from a class.

˅ To delete individuals from a class

1. Under Manage Records, click the **Groups** tab.

2. In the drop-down list, select **View/Edit Class Groups** and click **Go** .

3. In the drop-down list, select the **Master Group** where the class is listed.

4. Select the class the individuals are attending from the **Class** list.

5. In the **Name** area, select the individuals you want to remove from the class roster. To select several individuals, hold down **Ctrl** on your keyboard and select the individuals.

6. Click **Delete**.

7. When the confirmation message displays, click **Yes**.

About the Individual Information Grid Area

You can use the Individual Information Grid Area to add new family members, add new families, print or export the grid, filter the grid or edit individuals.

˅ To customize the grid

1. In the View/Edit Groups window, place your cursor in the **Individual Information** grid.
2. Right-click, and then click **Customize**.
3. Under **Settings**, select the options you want to use.
4. Under **Fields**, select the information fields you want to display in the grid or clear the information fields you do not want to appear in the grid. Using the up and down arrows, you can sort the order of the fields.
5. Click **OK**.
6. To move a field, click the field in the information bar at the top of the grid, and then drag it to the right or left and drop it in the desired location.

ⓘ **ACS OnDemand**

Files exported within the OnDemand environment will begin opening in OpenOffice instead of Microsoft® Office. For more information, click here.

In the View/Edit Groups Individual Information grid, you can organize the information alphabetically or numerically depending on the information type, by clicking on the field title bar. You can organize the roster by Individuals' names, Address Line 1, City/State/ZIP, Phone, Date Added, Date Last Changed, Date Dropped, Position Lists 1 - 5, Status, Primary Status, or Member Status

˅ To organize the roster

1. Under Manage Records, click the **Groups** tab.
2. In the drop-down list, select **View/Edit Class Groups**, then click **Go** .
3. Select the class roster you want organize.
4. In the **Individual Information** grid, click on the appropriate field bar.

Promoting Individuals in Attendance

With Attendance Promotion, you can move individuals from one class to another at the end of your attendance year.

Before promoting attendance, we suggest thinking about the changes you want to make to the class structure if any, and selecting your promotion method. And, since promotion involves major data changes, you should also perform a manual data backup.

You must complete the promotion and clearing processes separately for each attendance class group. Then, print the proof list, next year's class rolls, and the new year's attendance classes report before clicking **Promote** to officially complete the promotion.

Examples and Strategies For Attendance Promotion

Promotion Strategies

Here are some useful strategies for Attendance promotion:

- **Backups** — It's always smart to create a backup before you create or promote next years' classes.
- **Plan** — Before you start, think about what changes to make in the class structure if any. It can be helpful to sketch this information out.
- **Print Reports** — Be sure to print any appropriate reports to cross check class promotions.
- **Checkpoint Users** — After promotion is complete, check Add/Edit Sessions in Checkpoint to make sure the correct master group is selected. You must do this if you promoted to a new master group in Attendance because Checkpoint will have the previous master group selected.

Promotion Examples

Here are some useful examples of how attendance promotion works.

✓ **Moving all individuals in a class to a different class.**

With Promotion, you can move all of the individuals in the class to a different class.

For example, your Children's Sunday School classes are set up by grade level. At the end of the year, you want to promote the children in the Kindergarten Sunday School class to the First Grade Sunday School class, the children in the First Grade Sunday School class to the Second Grade Sunday School class, etc.

✓ **Promoting one individual at a time.**

You can promote one individual at a time.

For example, you have an Adult Singles Sunday School class and an Adult Married Sunday School class. Julie Smith is in the Adult Singles Sunday School class, but she just got married last weekend, so you want to promote her to the Adult Married Sunday School class.

✓ **Promoting several individuals at one time.**

Promotion allows you to select several individuals within a class to move to a new class. For example, you have a First and Second Grade Sunday School class. At the end of the attendance year, only the second graders will be moving to another class.

Selecting an Attendance Promotion Method

Before promoting attendance, think about what changes to make in the class structure if any. You may want to sketch this information out.

When you click **Start** to begin the promotion process, you have two options - Continue Current Master Group or Create New Master Group. If you select to create a new master group, you can also select the option to Copy Current Group Structure and Include Deactivated Groups.

Here are some examples of when to use each option.

✓ **Continue Current Master Group**

When continuing the current master group, you do not move people who are staying in the same class. If you do, this creates a dropped record for the old year and a new record for the new year, both inside the same existing group, instead of continuing with the one record they had before promotion. If you continue the current master group, you cannot change the start month.

Continue the current master group if you want to:

- Keep or maintain the current roster (class structure)
- Add a few classes within the current structure (classes would be added outside of promotion)
- Retain group history with the current group
- NOT be required to move everyone

> ⊘ **Tip**
>
> If you are continuing the current master group and have a class that you will not use next year, after completing promotion you can make the class **Inactive** through Group Setup. This way, you will not lose any of the history associated with the class, such as the attendance markings, but these classes will not show on Attendance Reports unless you select to **Include Deactivated Groups**.

✓ **Create New Master Group**

Creating a new master group creates a dropped record in the old group and a new record in the new group. All records that need to be in the new group must be moved during promotion to have a record in the new group.

Create a new master group if you want to:

- Change your start date
- Change group structure (for example, from 3 level to 2 level)
- Add classes within the promotion menu (these classes may also be added outside of promotion)
- Move everyone to a different class with their new master group (Required)
- Retain group history with the prior group

✓ **Create New Master Group and Copy Current Structure**

Creating a new master group and copying the current structure creates a dropped record in the old group and a new record in the new group. All records that need to be in the new group must be moved during promotion to have a record in the new group.

Create a new master group and copy the current group structure if you want to:

- Change your start date

- Add classes within the promotion menu (these classes may also be added outside of promotion)
- Move everyone to a different class with their new master group (Required)
- Retain group history with the prior group

Copying the current group structure copies the master group and the classes over for the new year.

> ⊘ **Tip**
>
> When you create a new master group and copy the current structure, you are creating a brand new group that mirrors the old one. If you have a class that you will no longer use in the new group, you can click **Edit** within the Promotion window and delete the class from the new group. This does not remove any history from that class because you are deleting the new class that does not have any members or markings yet.

✓ **Promote one individual through View/Edit Class Groups**

If you are only promoting one individual to a new class, you can promote the individual through View/Edit Class Groups. If the individual is moving to another class within the same master group, you can use the Transfer option. If you are promoting someone from one master group to another, you can drop them from their current master group and add them to their new master group. You can also use this method if you are promoting only two or three individuals. You can transfer, drop, and add individuals based on the effective date of your choice.

Promoting Attendance

At the end of your attendance year, you can promote individuals to next year's classes. You can promote attendance by division, department, and class by individual or by positions within a class.

Before promoting attendance, make a People backup and choose your promotion method. You can promote by continuing the current master group, by creating a new master group, or by transferring individuals through View/Edit Class Groups (if you are only promoting one or a few individuals). Creating a new master group creates a dropped record in the old group and a new record in the new group. When you create a new master group, you can copy the current group structure and you can include deactivated groups.

When you are working with attendance promotion, you can close and open the Promotion window as often as needed and your changes will be saved. None of the changes made in the Promotion window are permanent until you complete attendance promotion. You can also have more than one master group's promotion in progress in the Promotion Menu at the same time. For example, you can work on the Sunday School promotion while another user works on the Awana Club promotion.

⌄ To promote Attendance by continuing the current Master Group

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Attendance Promotion** and click **Go** .
3. On the Promotion menu, click **Start**.
4. In the **Master Group** drop-down list, select the group to promote, then select **Continue Current Master Group** and click **OK**.
5. When the confirmation message displays, click **Yes**.
6. **Optional:** In the Promotion window, click **Map**. In the Promotion Position Map window, make your changes in position promotions (if applicable), then click **Close**.
7. To filter based on positions, class status, or enrollment, click **Filter**.
8. In the left group (upper) pane select the class you want to promote an individual from. To show all levels or deactivated groups, click **All Levels** and/or **Show Deactivated**.
9. In the right group pane, select the class you want to promote an individual to.
10. In the left roster (lower) pane, select the individual to promote and click **Add** . Or, click **Add All** to select all individuals.
11. In the Roster Entry window, select the **Status** and **Position** you want to promote the individual to, then click **OK**.
12. Repeat steps 11-12 for each individual you want to promote, selecting the **Status** and **Position** for each one.
13. If applicable, continue promoting individuals for each class in the division. When finished, click **OK** and **Close**.

⌄ To promote Attendance by creating a new Master Group

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Attendance Promotion** and click **Go** .
3. On the Promotion menu, click **Start**.
4. In the **Master Group** drop-down list, select the group to promote.
5. Select **Create New Master Group**, then click **OK**.
6. When the confirmation message displays, click **Yes**.
7. In the drop-down list, select the master group you want to create a new group for, then click **OK**.

8. In the Group Name field, enter a group name. If applicable, enter a new **Master Level Name** and **Level 1 Name**. Click **Next**.
9. Select the group options you want to use, then click **Next**.
10. Select the lists to use, if applicable, and click **Next**.
11. Select to **Add Events**, **Setup Detail Marking Fields** and **Add Positions**, if applicable, then click **Next**.
12. Continue creating your new master group. When the **Finish** tab and summary display, click **Finish**.
13. When the Promotion Window Displays, click **Edit** next to the new master group name.
14. Click the **Group Levels** tab, and click **Add**. From here, you will add the Departments, Divisions, and Classes as needed. Once finished click **OK**.
15. **Optional:** In the Promotion window, click **Map**. In the Promotion Position Map window, make your changes in position promotions, then click **Close**.
16. In the left group (upper) pane select the class you want to promote an individual from. To show all levels or deactivated groups, click **All Levels** and/or **Show Deactivated**.
17. In the right group pane, select the class you want to promote an individual to.
18. In the left roster (lower) pane, select the individual to promote and click **Add**. All individuals must be moved to a class within your new master group.
19. In the Roster Entry window, select the **Status** and **Position** you want to promote the individual to, then click **OK**.
20. Continue to select individuals from the left roster pane, clicking **Add** after. Be sure to select the **Status** and **Position** for each individual.
21. When finished, click **OK** and **Close**.

˅ To promote Attendance by creating a new Master Group and copying group structure

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Attendance Promotion** and click **Go** .
3. On the Promotion menu, click **Start**.
4. In the **Master Group** drop-down list, select the group to promote.
5. Select **Create New Master Group**, then select **Copy Current Group Structure.** To copy any deactivated groups that are in the current group structure, select **Include Deactivated Groups**.
6. Click **OK**, then **Yes**.
7. Enter a new master group name, then click **OK**.
8. **Optional:** In the Promotion window, click **Map**. In the Promotion Position Map window, make your changes in position promotions, then click **Close**.
9. To make changes to the new master group, click **Edit** beside the new master group name.
10. In the left group (upper) pane select the class you want to promote an individual from. To show all levels or deactivated groups, click **All Levels** and/or **Show Deactivated**.
11. In the right group pane, select the class you want to promote an individual to.
12. In the left roster (lower) pane, select the individual to promote and click **Add**. All individuals must be moved to a class within your new master group.
13. In the Roster Entry window, select the **Status** and **Position** you want to promote the individual to, and then click **OK**.
14. Continue to select individuals from the left roster pane, clicking **Add** after. Be sure to select the **Status** and **Position** for each individual.
15. When finished, click **OK** and **Close**.

˅ To promote Attendance through View/Edit Class Groups

1. Under Manage Records, click the **Groups** tab.

2. In the drop-down list, select **View/Edit Class Groups** and click **Go** .
3. In the **Master Group** drop-down list, select the group the individual is currently enrolled in.
4. Select the class you want to promote the individual from and select the individual's name.
5. If the individual is moving to a class within the same master group, select the **Effective Date** you want the individual to be transferred on, then click **Transfer**.
6. In the Transfer Rosters window, select the class you want to promote the individual to. Select the **Status** and **Position**, and, if applicable, set the **Primary** flag. Click **OK**.
7. If the individual is moving to a class within a different master group, select the **Effective Date** you want the individual to be dropped from their current class, then click **Drop**. When the confirmation message displays, click **Yes**.
8. In the **Master Group** drop-down list, select the master group the individual is moving to.
9. Select the class you want to promote the individual to.
10. Select the **Effective Date** you want the individual to be added to the new class, then click **Add**.
11. Select the **Status** and **Position**, then click **Select People**. In the Select People to Add window, select the individual, then click **Add** or double click the individual's name. Click **OK**.

Additional Field Information

The Start Promotion Window

In the Start Promotion window, you can select the Master Group whose individuals you want to promote, and you can select whether to use a current group structure or create a new group structure when promoting.

Master Group
Displays the Sunday School group with the individuals you want to promote. Select the Sunday School group from the drop-down list.

Continue Current Master Group
To continue using the same group and transfer individuals with their current markings into the new year, select this option. If you select this option, the Start Date window displays after you have completed your roster changes in the Promotion window and click **Promote** on the Promotion Main Menu.

Create New Master Group
To create a new group when promoting, select this option. The options to copy the current group structure and to include deactivated groups become available when you select to create a new group.

Copy Current Group Structure
To create a new group with a structure that mirrors the group structure you have already set up, select this option. This is a good option if you want to make modifications to an already existing group structure to promote to.

Include Deactivated Groups
To include all deactivated groups from the group structure being copied in the new group, select this option.

The Start Date Window

If you selected **Continue Current Master Group**, the Start Date window displays. Once you complete the necessary steps for Promotion and click **Promote**, you can select today's date or the group start date to activate the promotion.

The Start Date option determines when the roster changes on the Promotion window become effective. For example, if you select **Group Start Date**, the date of activation for the promotion roster changes selected is the first day of the designated Start Month for the Master Group you selected to promote from.

Promote Using
Displays the activation date for the promotion roster changes you have selected.

Start Date Options

Today's Date
To set the activation date for the roster changes you selected during promotion as today's date, select this option.

Group Start Date
Select to set the activation date for the roster changes you selected as the first day of the designated Start Month for the Master Group you selected to promote from. The Group Start Date option is not available if the date is not within 60 days of your current system date. In this case, the Start Date defaults to your current system date.

Working with the Promotion Window

After you select a method of promotion (Continue Current Master Group or Create New Master Group), the Promotion window displays. This window displays the current group information on the left and next year's information on the right. The upper pane displays the group information, and the lower pane displays the individual information. You can customize the lower pane to display fields such as group name, status, and class position.

If you have selected the option Continue Current Master Group, you will not move any individuals who are remaining in the same class. If you do, a dropped record and a new record will be created for those individuals inside the same class.

If you have selected the option Create New Master Group, you must move all individuals from the old master group to the new group, even individuals who are remaining in the same class. For example, if you have a class called College and Career, and all of those individuals will remain in that class next year, you will still move them from the College and Career class in the current group to the College and Career Class in next year's group.

˅ To move individuals from their current class to next year's class

1. In the Promotion window, in the left group (upper) pane, select the class you want to promote an individual from. To show all levels or deactivated groups, click **All Levels** and/or **Show Deactivated**.
2. In the right group (upper) pane, select the class you want to promote an individual to.
3. In the left roster (lower) pane, select the individual to promote and click **Add** [icon]. Or, click **Add All** to select all individuals.

   > ⊘ **Tip**
   >
   > You can select several individuals by holding down the **Ctrl** key, selecting the individuals you want to move at one time, then clicking **Add** [icon]. This way, you can move all individuals who are being promoted to the same class who have the same **Status** and **Position**. For example, if you are continuing the current master group and want to move all enrolled members (status of enrolled, position of member) from the 2nd grade class to the 3rd grade class, you can select just those individuals and move them at one time.

4. In the Roster Entry window, select the **Status** and **Position** for the individual(s), then click **OK**.
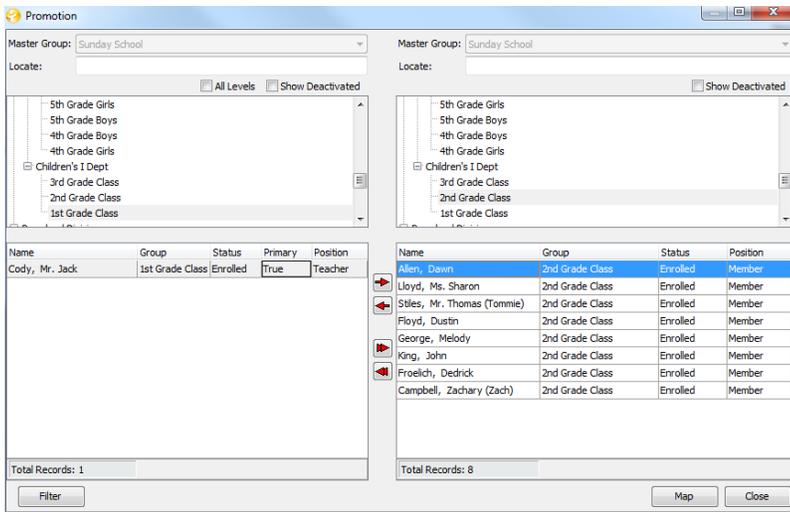
Promotion Window

You can close out of the Promotion window and open it back up often as you need, and the information will be saved. For example, if you move individuals from Nursery through 6th grade to their new classes and need to stop and go to a meeting. If you close out of the Promotion window and open it back up, all of the individuals you have moved and all of the changes that you have made will still be saved. Nothing in the Promotion window is permanent until you click the **Promote** option on the Promotion menu. You can review and make any corrections necessary before completing promotion. When you click **Promote**, you will not be able to move forward unless you have an ACS Backup that was made within the last two days.

You can have more than one master group's promotion in progress in the Promotion Menu at the same time. For example, you can work on the Sunday School promotion while another user works on the Awana Club promotion.
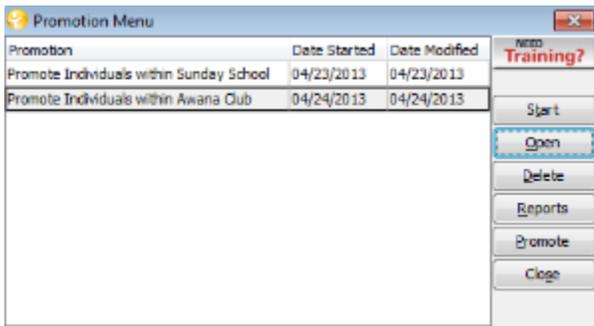
Promotion Menu

Completing Attendance Promotion

After you promote Attendance, you can complete promotion, print reports, and finalize your changes.

⌄ To complete promotion

1. Under Manage Records, click the **Tasks** tab.

2. In the drop-down list, select **Attendance Promotion** and click **Go** ➡.

3. On the Promotion menu, click **Reports**.

4. To ensure promotion is successful, print these reports *before* clicking **Promote**.
   - Attendance Promotion Proof List
   - Next Year's Attendance Classes
   - Next Year's Class Rolls

5. After printing and reviewing the reports, on the Promotion menu, click **Promote**.

6. When the confirmation message displays, click **Yes**.

7. If you are promoting using the **Continue Current Master Group** option, select **Today's Date** to make the promotion effective immediately or **Group Start Date** to use the group's start date, then click **OK**.

8. When the confirmation message containing the start date displays, click **Yes**.

9. If individuals who have not been promoted are in the groups, a confirmation message displays. Click **Yes** to list those individuals in the same roster, or **No** to return to the promotion menu, where you can move those records to new rosters.

Common Questions

Can I post attendance to the old group if Promotion has been processed?

Yes. You must select the option to **Mark Associates** under the group's Master Settings, and you must select a posting date prior to the effective date of the promotion in Enter/Post Attendance.

Why doesn't an individual's name display on the Enter/Post Attendance window after promoting?

The records for the new year do not display unless the posting date entered on the Enter/Post Attendance window is a date within the new attendance year. To view records for the new year, change the posting date to a date after the first day of the new attendance year. This also applies to viewing new groups on the Enter/Post Attendance and View/Edit Groups windows, as well as the **Activities** and **Classes** tabs on the View/Edit Individual window.

This does not apply to Reports and Searches. Master Groups created in Class/Worship or Activities Setup are available from the Master Group option in Reports and Searches at any time.

Why are there individuals who were dropped from their classes or who do not appear in the new group after promoting?

When using the **Create New Master Group** option during promotion, you must move the individuals that you want in the new group into a class in the new Master Group. When you promote, any individuals you do not move to the new group will remain in the previous group as Associate records, and have a Date Dropped of the last date of the previous year.

After promoting to the new group, why do asterisks (**) display beside individual records in the former group in Attendance reports?

When promotion to a new group is complete, all of the records in the former group have a Date Dropped equal to the last day of the former group's year, and are transferred into Associate records which are designated by asterisks (**) beside the record. The new group contains the current records, which are given a Date Added of the first day of the month and year for the new group.

Once you complete the promotion process, for the remainder of the first week, you must select an Effective Date of the first day of the month and year for the new group in order to select it from the group field. New groups are not available in the Master Group drop-down list on the Enter/Post Attendance and View/Edit Groups windows, and **Activities** and **Classes** tabs on the View/Edit Individual window, unless you select an Effective Date of the first day of the month and year for the new group. Once the system date on your computer exceeds the Effective Date, the new group is automatically available in the Master Group field.

Printing the Attendance Promotion Proof List

The Attendance Promotion Proof List can help you make sure that the correct people have been moved and that they have been moved to the correct new class. This proof list displays old and new class information on one report.

You should print the report after moving individuals, but before clicking **Promote** to complete attendance promotion.

To print the Attendance Promotion Proof List

1. Under Manage Records, click the **Tasks** tab.

2. In the drop-down list, select **Attendance Promotion** and click **Go** .
3. On the **Promotion** menu, click **Reports**.
4. In the reports window, expand **Lists**, then select **Rolls**. Click **Customize**.
5. On the **Report Options** tab, select the **Master Group** you are promoting.
6. Under **Report Settings**, select **Special Fields**, then click **Select**.
7. In the Column drop-down list, add **Next Year's Division**, **Next Year's Department**, and **Next Year's Class** to the list of selected special fields.

8. **Optional:** Under Column, select **Position**, then click **Add** .

9. **Optional:** Under Column, select **Status**, then click **Add** , then click **Close**.
10. Click **Preview** to view the report.
11. The Column Settings window displays. Adjust the columns as necessary, then click **OK** and **Print R**

    eport .

> ⚠ **Note**
>
> If the **Next Year's Division**, **Next Year's Department**, or **Next Year's Class** fields are blank, individuals were not promoted to a class. If you need to make any changes, complete the changes prior to clicking **Promote** on the Promotion menu.

Printing Next Year's Class Rolls

Printing next year's class rolls helps you make sure that the correct people have been moved and that they have been moved to the correct class.

You should print rolls after moving individuals, but before clicking **Promote** to complete attendance promotion.

˅ To print Next Year's Class Rolls

1. Under Manage Records, click the **Tasks** tab.

2. In the drop-down list, select **Attendance Promotion**, then click **Go** .

3. On the Promotion menu, click **Reports**.

4. In the reports window, expand **Lists**, then select **Rolls**. Click **Customize**.

5. On the Report Options tab, select the **Master Group** you are promoting from.

6. Under **Report Settings**, select **Special Fields** and click **Select**.

7. Under **Column**, select **Position** and click **Add** .

8. Under **Column**, select **Status**, **Add** , then click **Close**.

9. Under **Report Options**, select **Print Next Year**.

10. Click **Preview** to view the report.

11. In the Column Settings window, adjust the columns as necessary, then click **OK**.

12. Click **Print Report** .

Printing the Next Year's Attendance Classes Report

The Next Year's Attendance Classes report can help you make sure that you have structured the new group correctly.

You should print the report after moving individuals, but before clicking **Promote** to complete promotion.

To print the report if using the same group structure

1. Under Advanced Tools, click the **Settings** tab,
2. In the drop-down list, select **Groups** and click **Go** .
3. Select the **Master Group** you want to print, then click **Print**.

To print the report if using a new group structure

1. Under Manage Records, click the **Tasks** tab.
2. In the drop-down list, select **Attendance Promotion** and click **Go** .
3. Select the promotion you want to print, then click **Open**.
4. In the Promotion window, click **Edit**.
5. In the Edit Group window, click the **Group Levels** tab.
6. Expand or contract the structure to how you want it to display when printed, then click **Print**.

Removing Linked Positions

If an individual's status within your organization changes, you can remove linked positions.

˅ To remove linked positions

1. Under Manage Records, click the **Tasks** tab.

2. In the drop-down list, select **Attendance Promotion** and click **Go** .

3. Click **Open**, then **Map**.

4. In the bottom display area, select the link you want to remove, then click **Remove**.

Performing an Attendance Inquiry

You can use Attendance Inquiry to view an individual's attendance information. You can view attendance for each individual or you can view a combined grid that shows the attendance in summary by the months of a year or the weeks of a month.

˅ To perform an attendance inquiry

1. Under Run Inquiries, click the **Inquiry Type** tab.

2. In the drop-down list, select **Attendance Inquiry** and click **Go** ➡ .

3. In the Find Person window, select the individual whose information you want to view and click **OK**.

4. In the **Master Group** drop-down list, select the activity or event that you want to see the individual's attendance for.

All attendance information displays. You can select to view attendance information by the months in a year, the days in a month, or by the weeks in a month, by clicking on the appropriate tab.

Attendance Marking Key

The Individual tab in the Attendance Inquiry window uses the following to identify the attendance marking for a specific date:

A — The individual was absent.

P — The individual was present.

C — The individual took communion.

M - The individual had mixed attendance. Mixed attendance can mean any of the following attendance combinations over the period of a day: present and communion, present and absent, absent and communion, or present, absent, and communion.

Additional Field Information

Attendance Inquiry - The Individual Tab

- **Master Group** — From the drop-down list, select the activity or class master group that the individual is participating in. If the group contains lower levels, they display in the area to the left of the window.
- **Locate** — Enter the group name or Quick-Code. The Locate feature is available only if All Levels is not selected and you have entered a quick code for the class.
- **Show Deactivated** — Select to show deactivated sub-levels or rosters in the selected master group. Deactivated master groups display in the hierarchy view.
- **Name Information** — Displays the individuals name and their primary address.
- **Select Event and Year** — Select the event and year you want to view markings for.
- **Yearly** — Select to view the total attendance markings for an individual for a selected year. Double-click on a marking to open the Inquiry Detail window.
- **Monthly** — Select to view the total attendance markings for an individual as represented by days in the selected month. Double-click on a marking to open the Inquiry Detail window.
- **Weekly** — Select to view the total attendance markings for an individual as represented by the week within a month.
- **Total Present** — Displays the total days that an individual was present for an activity, or class.
- **Total Communion** — If you selected the marking communion option, this field displays the total number of times that an individual took communion.
- **Total Absent** — Displays the total days that an individual was present for an activity or class.
- **Overall DLA** — Displays the last date that an enrolled individual attended activities or classes.
- **Master Group DLA** — Displays the last date that the individual attended the selected activity or class.
- **Roster Group DLA** — Displays the last date that the individual attended the roster group.

Attendance Inquiry Buttons

- **Previous Family** — Click to advance to the previous family's Attendance Inquiry window. The window displays the last individual in the previous family.
- **Previous Individual** — Click to advance to the Attendance Inquiry window for the previous individual.
- **Next Individual** — Click to advance to the Attendance Inquiry window for the next individual.
- **Next Family** — Click to advance to the Attendance Inquiry window for the first individual in the next family.
- **Find Person** — Click to access the Find Person window. From this window, you can select an individual to view their attendance information.
- **Show Rosters** — This button is available if you set up roster levels for your group. Click to see roster information for the activities an individual is participating in.
- **Print** — Click to print attendance information for the selected individual.
- **Filter** — Click to filter the attendance results according to your selections from Element 1 and 2.

Changing Attendance Markings in Inquiry

You can change an individual's unposted Attendance markings in Inquiry.

ˇ To change markings in Inquiry

1. Under Run Inquiries, click the **Inquiry Type** tab.
2. In the drop-down list, select **Attendance Inquiry**, then click **Go** .
3. Select the individual whose markings you want to change, then click **OK**.
4. On the **Individual** tab, select the **Month** tab.
5. Double-click the date you want to change a marking for.
6. Under **Markings**, click on the marking you want to change, then click **Edit Marking**.
7. Select the appropriate Marking letter, and then click **OK**. When the confirmation message displays, click **OK** again.
8. Click **Close**.

Attendance Reports

In Attendance, you can preview and print the following reports.

˅ To print Attendance Reports

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Attendance** and click **Go** .
3. In the upper sidebar, expand the type of report you want to print.
4. Select the report you want to print, then click **Customize**.
5. On the **Report Options** tab, select the appropriate options, then click **Preview**.
6. When the report displays, click **Print** .

Report	Description
Attendance Class by Location	Creates a list of attendance rosters sorted by location. Locations only display if they have been entered in the **Settings** > **Roster** tab.
Marking Grid	Creates a roster list with names and weekly grids for marking. To select attendance groups, click **Customize**.
Marking Sheet	Creates a roster marking sheet. To use Custom Sort, Name Options, and Special Fields on your marking sheet, you must mark details in the Master Group. To select attendance groups, click **Customize**.
Master Groups/Events Barcode List	Creates a list of Master Groups and their events with bar codes to use with a barcode scanner.
Rolls	Creates a list of individuals based on the selected Master Group. At the end of each roster, tallies display for members, prospects, and a total is given. Primary and associate statuses are noted.

If promoting attendance, you can use this report to print a proof list and show old and new class information on the report. To learn more, see Printing the Attendance Promotion Proof List. |
| Roster Changes List | Creates a list of individuals who have been added, dropped, or transferred. The date of the change, division, department, and class are also included. |

Roster List	Creates a list of individuals based on the selected Master Group. To select attendance groups or include special fields, click **Customize**. You can also group the report based on division, department, or name.
Absentee Report	Creates a roster list with times present, times absent, and percent present. To select attendance groups, click **Customize**.
Individual Attendance- Daily Markings	Creates a list of individuals, grouped by roster, along with their daily attendance markings for a seven or fourteen day period.
Individual Attendance Detail	Creates a list of individuals, grouped by roster or class, along with their Detail Marking Fields for the selected date range. To select attendance groups, click **Customize**.
Individual Attendance Summary	Creates a list of individuals, grouped by roster or class, along with their attendance markings for the selected date range. The percent present also displays, and there must be a 7 day span between markings for Sunday School class types. You can also print this report using search results- for example, to print the report for the families of each deacon. To select attendance groups, click **Customize**.
Present Count by Age	Creates a list of individuals who are enrolled and have been marked present for the selected date range. For each roster, the list is in age order. This is a good report to print prior to attendance promotion. To select attendance groups, click **Customize**.
Roster Attendance Detail	Creates a list for the selected rosters that includes Detail and Summary Fields. To select attendance groups, click **Customize**.
Roster Attendance Summary	Creates a list of summary transfers, both in and out, additions and drops, for members and prospects. Totals for Detail and Summary fields set to **Add to Head Count** on the **Marking Fields** tab in Setup are included.

Roster Attendance Summary - Yearly	Creates a list of weekly roster totals of members and prospects for a selected year. To select attendance groups, click **Customize**.
Roster Totals by Class	Creates a summary of roster totals, including the number of enrolled and the number of present enrolled and non-enrolled individuals. This list is sorted by division, department, then class. To select attendance groups, click **Customize**.

Customizing Attendance Reports

On the **Report Options** tab in Attendance Reports, you can set up custom options to print on reports, rolls, and marking sheets. The customization options are described below; however, not all options are available on all reports.

˅ To customize Attendance reports

1. Under Searches and Reports, click the **Reports** tab.
2. In the drop-down list, select **Attendance** and click **Go** ➡.
3. In the upper sidebar, expand the type of report you want to customize and print.
4. Select the appropriate report, then click **Customize**.
5. On the **Report Options** tab, select the appropriate options, then click **Preview**.
6. When the report displays, click **Print** 🖨.

Additional Field Descriptions

Report Title – Displays the report you are working with. You can change the report title when saving it.

Report Date – Select the date of the report.

Master Group – In the drop-down list, select the master group that you want to display on the report.

Columns – Select the number of columns you want to print on the report.

Prior Postings – Select the number of prior postings you want to display on the report.

Report View – Select the report view you want on the report. The available options vary depending on the report, but you can select the month you want the report to start on for both Yearly and Quarterly views.

Name Options – Select one of these options (**Formal**, **Informal**, or **Custom Label Name**) to print individual names in the selected format. If you print a custom label name on the report, you can print last name first, include the middle name, print the individual's "Goes By" name instead of the first name, or include titles and suffixes.

Address Options – To print address information, select **Print Address**. Then, you can select to print the city, state, and zip only, or select to print the phone number.

Search Results – To use the results of your last search for the report, select this option. The number of records found in your last search and the date of the search display.

Report Settings

- **Select Groups** – To include particular groups in your report, select this option. Click **Select** to pick the groups to include.
- **Custom Sort** – To sort the printed information by selected fields, select this option. Click **Select** to set the fields to sort by.
- **Special Fields** – To include selected special fields in the report, select this option. Click **Select** to choose the special fields to include. For example, you could use this to include the date last attended on a report.
- **Filter** – To set available fields as filters to tailor the information in the report, select this option. Click **Select** to set the filter.
- **X-Ref Groups** – To create a report that combines markings from an individual's primary class and also other classes that they are enrolled in, select this option. The person prints in their primary class and a **Present** takes precedence over an **Absent** marking.
- **Events** - If you want to report on specific events or a combination of events, select this option.
- **Mark Events** – To print a marking box for each event for the selected group, select this option. When you select Mark Events, the Columns section changes to 1, the Prior Postings section changes to 0, and you cannot change the Columns, Prior Postings, or Report View areas.
- **Marking Sheet Footer** – To include a footer on your marking sheets, select this option. By default, if an Activity or Worship group is selected when printing the Marking Sheet or Marking Grid reports, the Marking Sheet Footer option is automatically enabled.
- **Additional Options** – Click to see additional available report options.

Report Options

- **Multiple Markings as 1 Marking** – To count an individual Present only once if they have been marked Present for more than one class or activity or event per day, select this option. This is especially useful when calculating "the number of individuals touched" per day.
- **Include Deactivated Records** – To include deactivated records in your report, select this option.
- **Include Rosters w/o Markings** – To include rosters without markings in your report, select this option.
- **Print Detail Marking Fields** – To include the detail marking fields you have set up, select this option.
- **Print Summary Marking Fields** – To the summary marking fields you have set up, select this option. This lets you print boxes on marking sheets.
- **Print Blank Line** – To print a blank line with each individual's name, select this option. This line can be useful for recording comments on the marking sheet.
- **Print Bar Codes** – If you use bar codes to mark your enrolled individuals, select this option to include the bar codes on your report.
- **Print Unlisted Phone** – To include unlisted phone numbers on your report, select this option.
- **Print Families Together** – To create a report where families print together, select this option. The names print in alphabetical order and with the heads-of-household first.
- **X-Ref Rosters Within Group** – To create a report that displays markings from an individual's primary class and also the other classes that they are enrolled in, select this option.
- **Print Next Year** – To print a report of promoted individuals, select this option. You can run this report before actually processing the promotion to check for accuracy of the promotion.

Badge Settings

- **Badge Style** – Select from three different name badge styles for individuals participating in the selected activity or attendance class. These styles include **Name Badge Inserts (Avery 5390)**, **Name Badge Labels (Avery 5395)**, and **Hanging Name Badges (Avery CS-4C).**
- **Select Field** – Select a field to add to the name badge.
- **Font** – Click to assign font settings for the selected name badge field.

Attendance Name Badges

In Attendance, you can preview and print name badges. Each badge has four lines, and you can customize the badges by adding information from an individual's profile or text fields or barcodes.

˅ To print name badges

1. Under Searches and Reports, click the **Reports** tab.

2. In the drop-down list, select **Attendance** and click **Go** .
3. In the upper sidebar, expand **Labels**.
4. Select **Name Badges**, then click **Customize**.
5. On the **Report Options** tab, select the appropriate options, then click **Preview**.

6. When the name badges display, click **Print** .

Attendance Graphs

In Attendance, you can preview and print the following graphs:

- **Attendance Statistics Graph** — This graph displays a visual representation based on members and/or prospects from the group or roster you select. You can subtotal the graph by fields from the People and Attendance modules.
- **Attendance Totals Graph** — This graph displays a visual representation of the average, count, sum, maximum, or minimum on total present, absent, and communion fields for individuals in the selected group or roster.
- **Attendance Totals Graph by Month** — This graph displays a visual representation of the average, count, sum, maximum, or minimum number of people present for the selected group or roster for each month of the selected attendance year.
- **Average Attendance by Month: Multi-Year** — This graph displays a visual representation of the average number present for the selected group or roster for each month based on the selected attendance years.
- **Average Attendance by Month: Single-Year** — This graph displays a visual representation of the average number present for the selected group or roster for each month based on the selected attendance year.

˅ To print Attendance Graphs

1. Under Searches and Reports, click the **Graphs** tab.
2. In the drop-down list, select **Attendance** and click **Go** .
3. In the upper sidebar, expand the type of report you want to print.
4. Select the graph you want to print, then click **Customize**.
5. On the **Report Options** tab, select the appropriate options, then click **Preview**.
6. When the report displays, click **Print** .