


## Adding Individuals to a Group



In this lesson, you will learn how to add individuals to an Activity or Class group roster.

1. From the **Workbench** menu, under **Manage Records**, on the **Groups** tab, select either **View/Edit Activity Groups** or **View/Edit Class Groups** and click .

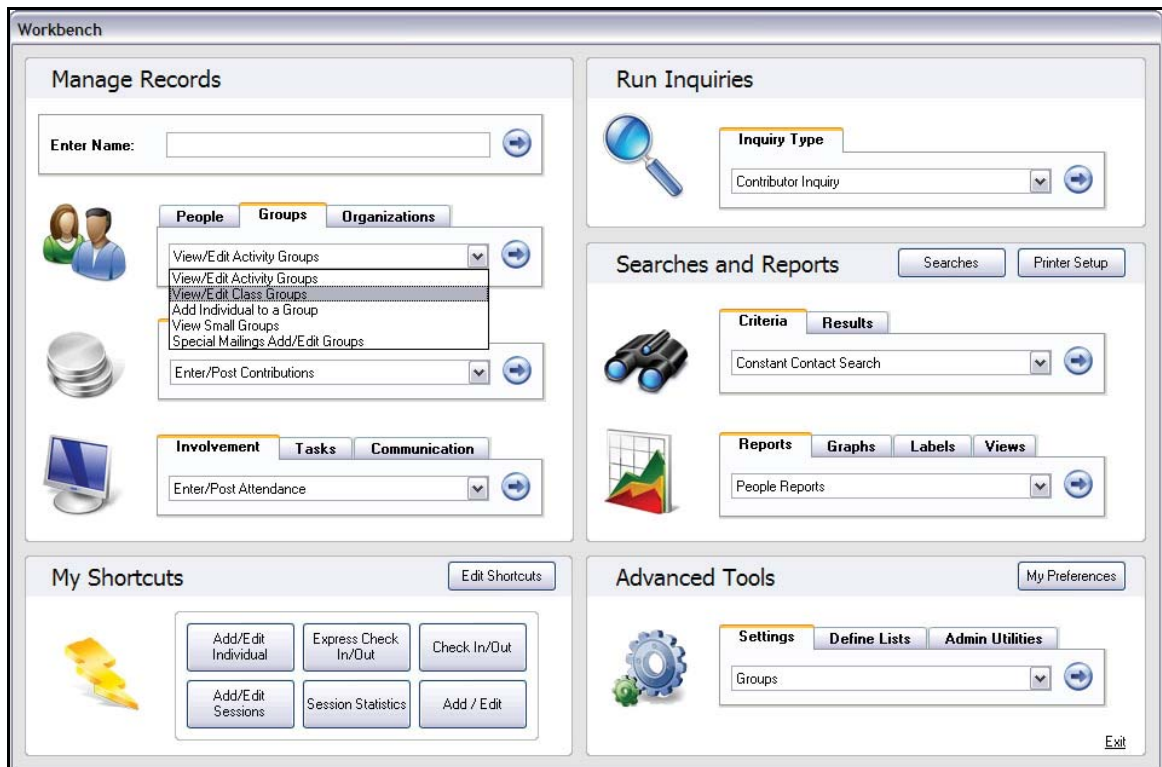


Figure 49: Manage Records - Groups

2. Choose the master group from the drop-down list.
3. Select the appropriate category.
4. Click **Add**.

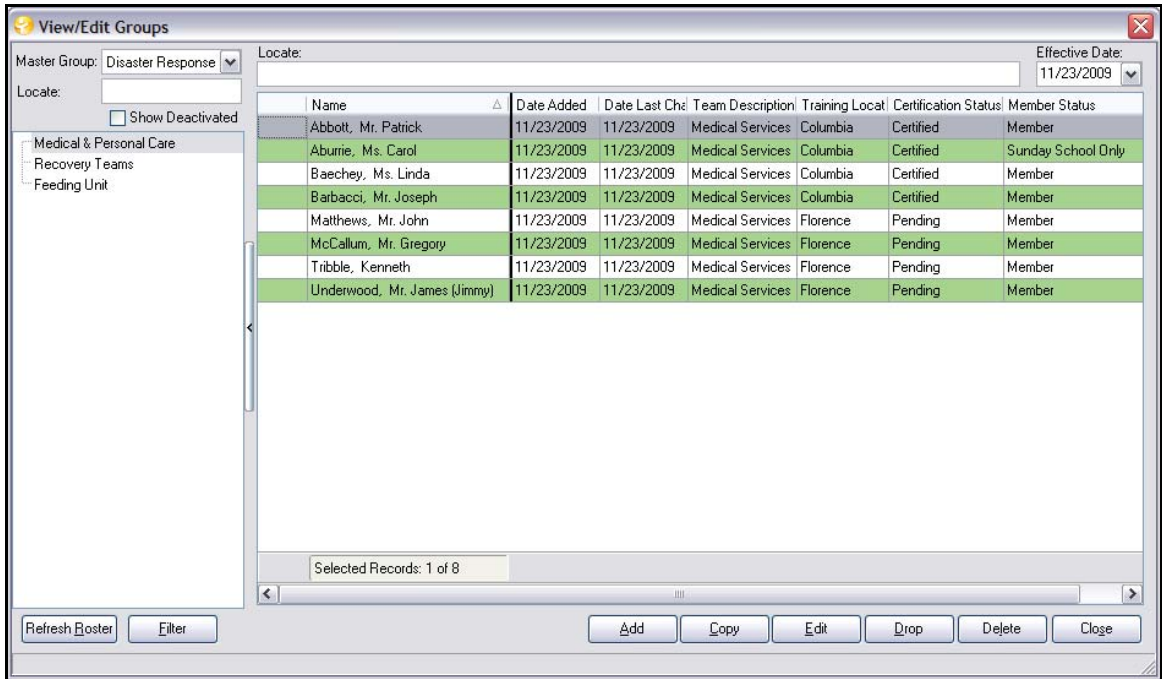


Figure 50: View/Edit Groups

5. Select the list items you want to apply to the people you are adding.
6. Select the date that they joined the group.
7. Click **Select People**.

**New Roster**

Master Group: Disaster Response Team Effective Date: 11/23/2009

Locate: Group: Medical & Personal Care

Show Deactivated

Medical & Personal Care  
Recovery Teams  
Feeding Unit

**General Fields**

Team Description: Medical Support

Training Location: Columbia

Certification Status: Pending

**Additional Fields**

Notification Time:

Last Certification Date: 12/13/2009 to 12/13/2009

**Activation Dates**

Date Added: 11/23/2009

Date Dropped:

Select Orgs Select People Close

Figure 51: New Roster

8. Select the individuals that you want in this group. You can use the following methods to select individuals:
  - Click on a name and then click the single right arrow (moves the individual to the selected column).
  - Double-click a name (moves the individual to the selected column).
  - Hold **Ctrl** and double-click on a name (moves the individual and all family members to the selected column).
  - Click the double right arrow (moves all individuals in the list to the selected column).
9. Click **OK**.
10. Click **Close**.

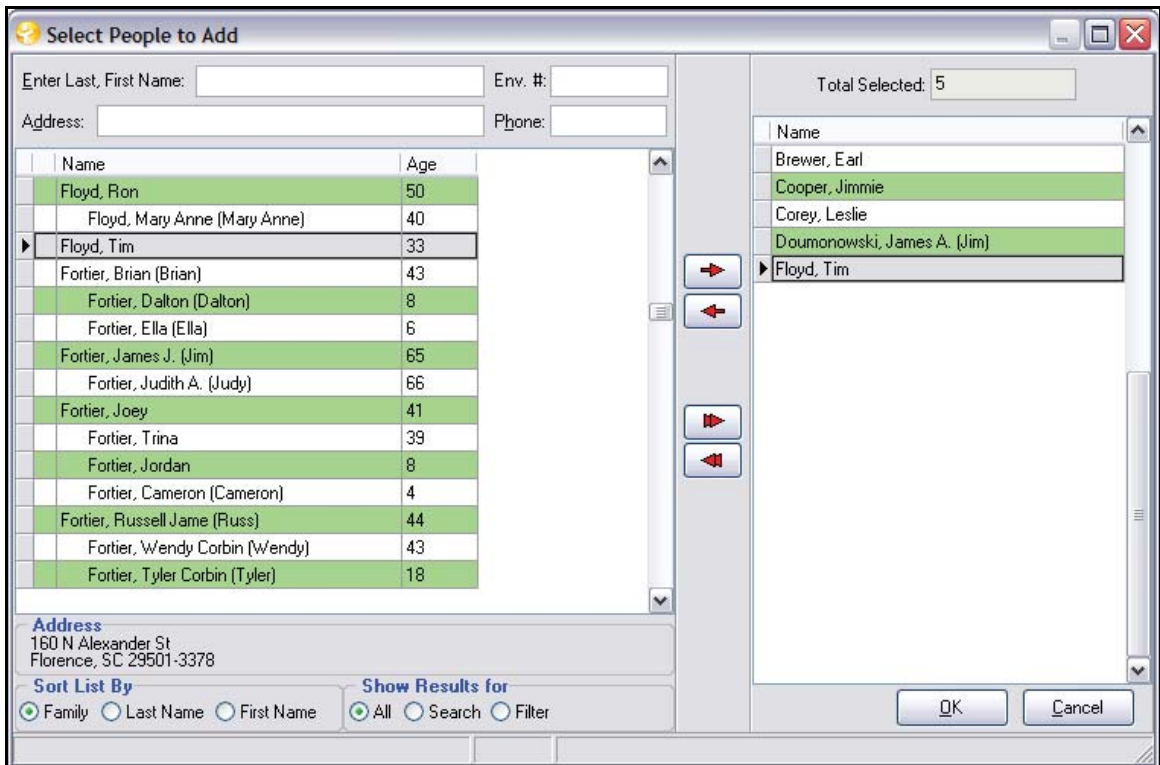


Figure 52: Select People to Add



### Useful Information

Run a search or create a filter that gives you an exact list of individuals to add to the group. Select **Search** or **Filter** in the **Show Results for** window, then add the entire list to the group.

## Dropping Individuals from a Group



Dropping an individual from an Activity or Class group roster means that the individual's history is retained through the date the drop was completed. The individual will print on reports prior to the date dropped. In this lesson, you will learn how to drop an individual from an Activity or Class group roster.

1. From **View/Edit Groups**, choose the master group from the drop-down list.
2. Select the appropriate category.
3. Set the **Effective Date** to the drop date.
4. Select the individuals from the roster list. To select multiple names, hold **Ctrl** and click the additional individuals. To select all individuals, click any individual in the list, hold **Ctrl** and press **A**.
5. Click **Drop**.

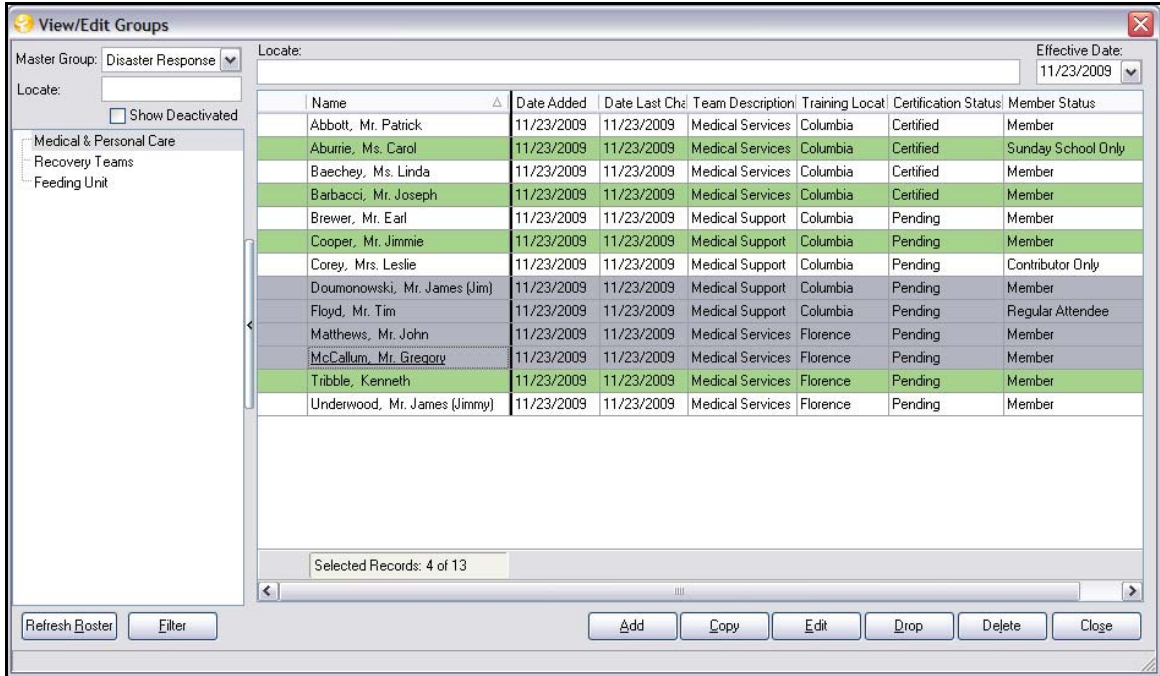


Figure 53: View/Edit Groups

6. Click **Yes** to confirm.
7. Click **Close**.



**Useful Information**

Dropping an individual adds a date removed to the record for use with filters, searches, and attendance reports.

Deleting an individual permanently removes any record of the individual’s involvement with the group. Use this only in cases where an individual was added to a group by mistake. Drop rather than delete individuals who are no longer active in a group.

## Transferring Individuals Between Classes



Transferring an individual moves them from one group roster to another, retaining any attendance marking history. Transferring is often used when an individual moves from one age group to another, or simply chooses another class to attend. In this lesson, you will learn how to transfer an individual from one class roster to another class roster.

1. In the **View/Edit Groups (Class)** window, select the class in which the individuals are currently enrolled.
2. Select the individuals you want to transfer
3. Click **Transfer**.

The screenshot shows the 'View/Edit Groups' window. On the left is a tree view showing a hierarchy of groups under 'Sunday School'. The main area is a table with the following data:

Name	Date Added	Date Last Chg	Date Dropped	Position
Bailey, Savannah	12/31/2001	8/31/2003		Member
Cody, Sarah	12/31/2001	8/31/2003		Member
Crumpton, Miss Katherine (Kathy)	12/31/2001	8/31/2003		Member
Patterson, Randy	12/31/2001	8/31/2003		Member
Jamison, Mr. Albert	2/3/1999	8/31/2003		Member
Jamison, Mr. Robert (Rob)	2/3/1999	8/31/2003		Member
Jamison, Miss Katheryn (Kathy)	12/24/2000	8/31/2003		Member
Lambert, Miss Catherine (Cathy)	2/3/1999	8/31/2003		Member
Anderson, Shanna	12/31/2001	8/31/2003		Member
McDaniel, Frank	12/31/1995	8/31/2003		Prospect
McDaniel, Heather	8/19/2001	8/31/2003		Member
Adams, Bobby	12/31/2001	8/31/2003		Member
Brewer, Dee	9/24/2001	8/31/2003		Member
Hicks, Ms. Donna	12/31/2001	8/31/2003		Member
Patterson, Peter	12/31/2001	8/31/2003		Member
Legan, Mr. Dale	2/23/2002	8/31/2003		Prospect
Doumonowski, Ms. Christine (Chri	8/31/2005	8/31/2005		Member
Elmore, Joey	8/31/2005	8/31/2005		Member
Alsberry, Jason	8/31/2005	8/31/2005		Member

At the bottom of the window, there are buttons for 'Refresh Roster', 'Filter', 'Add', 'Copy', 'Transfer', 'Drop', 'Delete', and 'Close'. The 'Transfer' button is highlighted in yellow.

Figure 54: View/Edit Groups

4. Select the class into which the individuals are transferring.
5. Select the status and position they will have in the new class.
6. Select any of the optional list fields that will apply to all the transferred individuals.
7. Click **OK**.
8. Click **Close**.

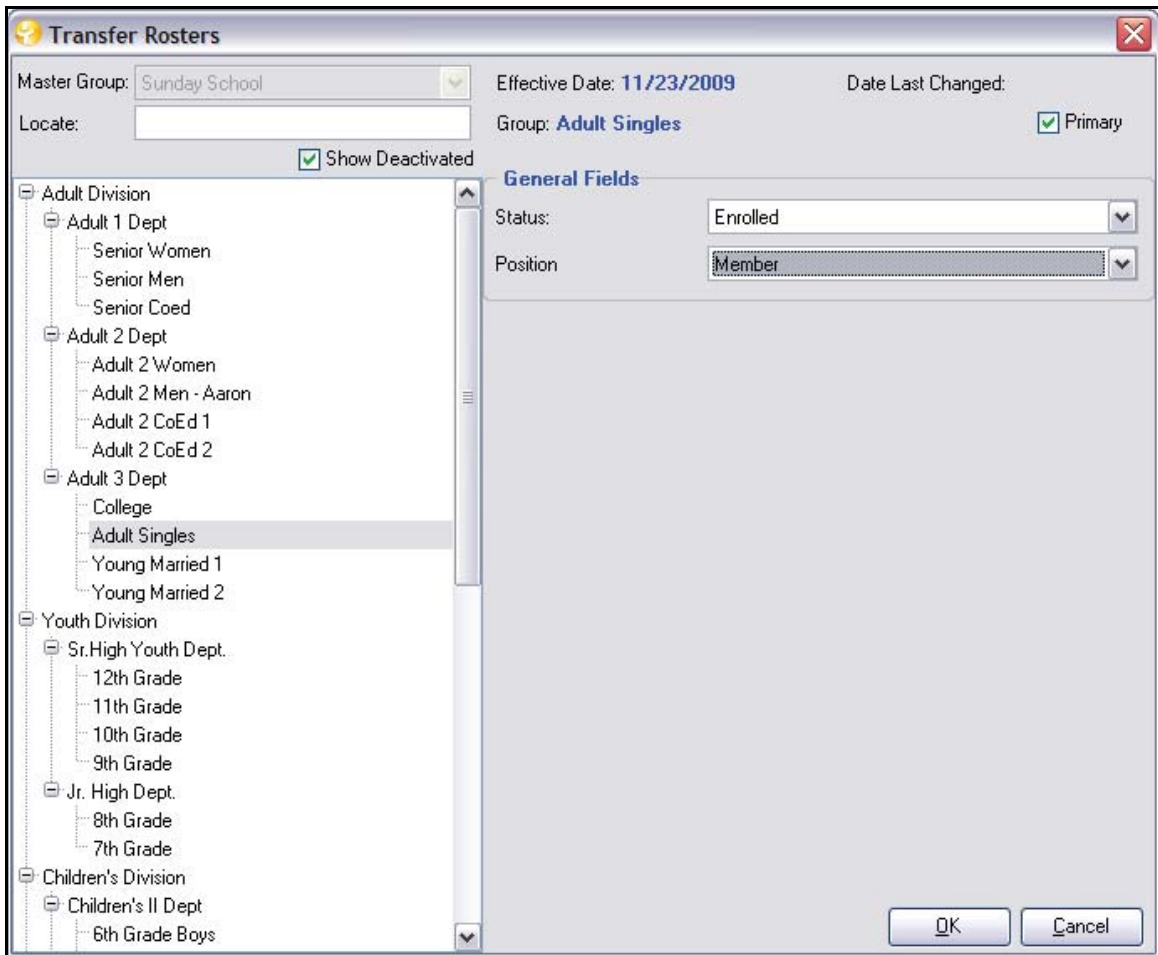


Figure 55: Transfer Rosters



## Viewing a Group’s Roster (Including History)



To view a current roster of active group members in the People module:

1. In the **View/Edit Group** window, choose the master group from the drop-down list (not shown).
2. Select the appropriate category.

The screenshot shows the 'View/Edit Groups' window. On the left, there is a tree view of categories including Athletics, Church Office Volunteers, Committees, Deacons, Hospital List, and Mission Skills. The 'Master Group' is set to 'Church Involvement'. The 'Effective Date' is 11/23/2009. The main area displays a table of 37 records. Below the table, there are buttons for Refresh Roster, Filter, Add, Copy, Edit, Drop, Delete, and Close.

Name	Date Added	Date Last Changed	Element 1	Element 2	Element 3
Aaron, Mr. James (Jim)	2/17/2009	2/17/2009	Medical	Brazil Team	Has Se
Aaron, Mrs. Jane	8/27/2003	1/30/2006	Clerical	Anywhere	Willing
Abel, Mr. Carl Sr (Kurt)	12/31/1985	5/2/2007	Education	Anywhere	Willing
Abraham, Ms. Annie	8/27/2003	1/30/2006	Clerical	Anywhere	Willing
Adams, Bill	12/31/1995	4/9/2003	Medical	Brazil Team	Has Se
Anderson, Mr. Arthur	8/27/2003	1/30/2006	Agriculture	Anywhere	Willing
Baechey, Mr. Robert	8/27/2003	1/30/2006	Agriculture	Anywhere	Willing
Bailey, Mr. Ralph	8/27/2003	1/30/2006	Agriculture	Anywhere	Willing
Berry, Ms. Janice (Jan)	12/31/1985	1/30/2006	Spanish Lang.	Anywhere	Willing
Elmore, Mr. Bryan	8/27/2003	1/30/2006	Construction	Brazil Team	Has Se
Floyd, Mr. Tim	8/27/2003	1/30/2006	Construction	Anywhere	Willing
Foxall, Mr. William	8/27/2003	1/30/2006	Construction	Anywhere	Willing
Freeman, Mr. Ralph (Ray)	8/27/2003	1/30/2006	Construction	Anywhere	Willing
Hendricks, Mr. William	8/27/2003	1/30/2006	French Lang.	Anywhere	Willing
Hicks, Ms. Donna	8/27/2003	1/30/2006	French Lang.	Anywhere	Willing
Hilley, Ms. Jenny	8/27/2003	1/30/2006	French Lang.	Anywhere	Willing
Jamison, Mrs. Ginger	12/31/1985	1/30/2006	Spanish Lang.	Anywhere	Willing
Johnson, Miss Carrie	2/13/2005	2/13/2005	Musical	Brazil Team	Willing
Kieke, Mrs. Jenna	8/27/2003	1/30/2006	Education	Anywhere	Willing

Figure 56: View/Edit Groups

To view a roster, as of a specific date:

1. In the **View/Edit Group** window, choose the master group from the drop-down list (not shown).
2. Select the appropriate category.
3. In the **Effective Date** field, enter the specific date.

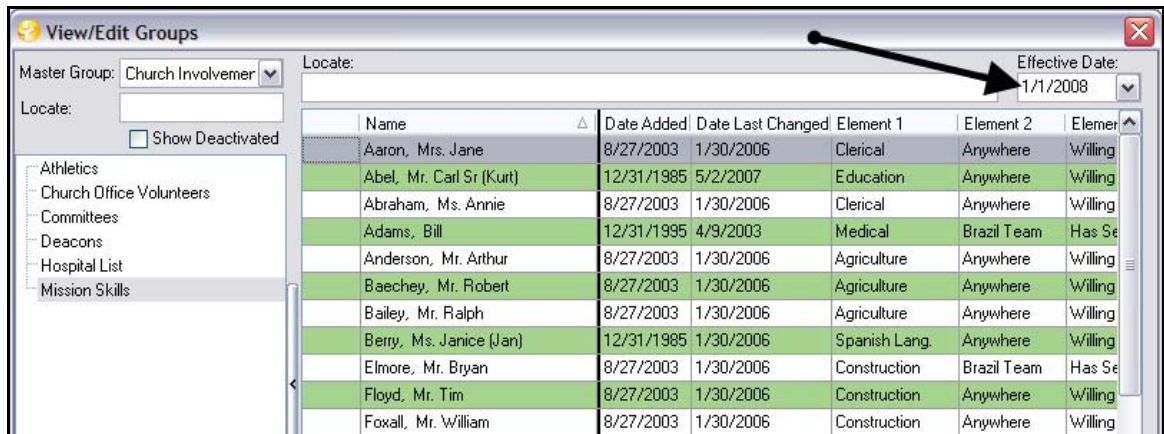


Figure 57: View/Edit Groups - Effective Date

To view a roster of all group members, past and present:

1. From the **Classic** menu, on the **People** tab, click **Search**, or from the **Workbench** menu, click **Search** (not shown).
2. Under **Search On**, select **All Records**.
3. Under **Include Records that**, select **Meet Criteria for all Field Areas (And)**.
4. Under **Search Output Flag**, select **Matching Individuals**.
5. Click **New Search**.
6. Double-click **Class Rosters** or **Activity Rosters**.

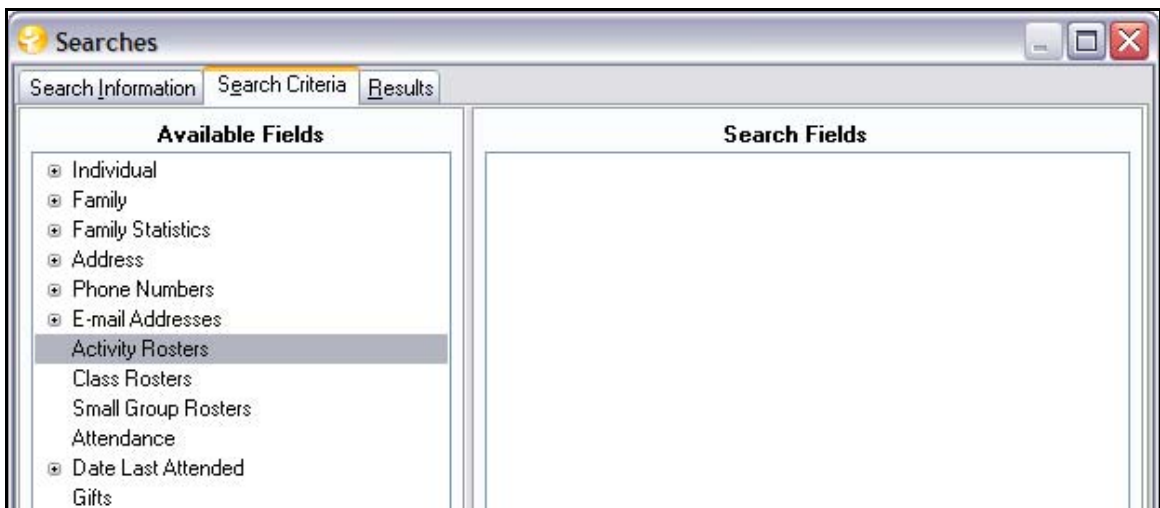
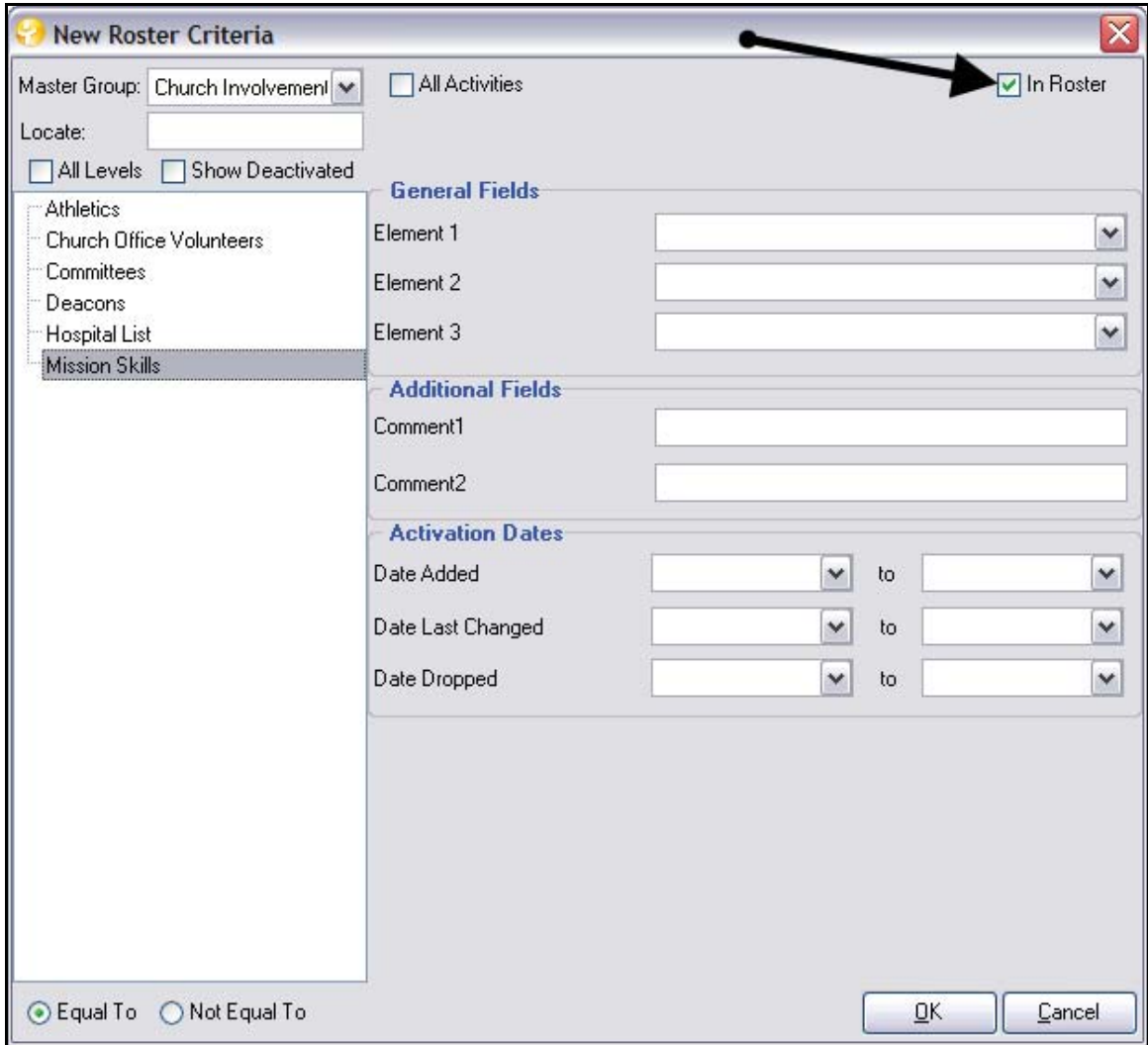


Figure 58: Searches

7. Choose the master group from the drop-down list.
8. Select the appropriate category.
9. Clear **In Roster**.
10. Click **OK**.



**Figure 59: New Roster Criteria**

11. Click **Process** (not shown).
12. On the **Process Complete** dialog box, click **OK** (not shown).
13. Click the **Results** tab (not shown).

14. Click **Customize** to add additional fields, such as phone number or address (not shown).
15. Click **Print** to print the grid (not shown).
16. Click **Close** (not shown).