



## ACS People Suite – Attendance



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# 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.

## Attendance Startup Outline

The Attendance module provides 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.

## 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.

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**.

## 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.

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**.

## 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.

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.

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.


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**.

## 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.

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.


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**.

## 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.

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**.

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.

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.

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.

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**.


## 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.

1. 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.
2. Select the group you want to update attendance for, then click **Maintenance**.
3. Under Items, select **Update Date Last Attended**, then click **Start**.
4. 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).

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.

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.

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.


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.

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**.

### 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.

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.


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.

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.

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 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**.


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 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.

### 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.

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**.


### Printing from the Groups Tab

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

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**.

### 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.

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 **SPACE BAR** 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.


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**.

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**.
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.

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 nonenrolled for a Worship group.

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.

## 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.

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

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.

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**.

## Deleting Individuals From A Class

You can 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.

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 open in [OpenOffice](#) instead of Microsoft® Office.

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

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.

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 complete the promotion.

# Examples and Strategies For Attendance Promotion

## Promotion Strategies

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Here are some useful strategies for Attendance promotion:

- **Backups** — You must create a backup before you create or promote next years' classes. With a recent backup, you can restore your data if you encounter issues during the promotion process.
- **Plan** — Before you start, think about what changes to make in the class structure if any. You may want to sketch this information out and review it with your team.
- **Print Reports** — 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 Examples and Strategies For Attendance Promotion has the previous master group selected.

## Promotion Examples

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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 got married last weekend, so you want to promote her to the Adult Married Sunday School class.

### Promoting several individuals at one time.

Promotion lets you select several individuals within a class to move to a new class.

For example, you have a Sunday School class that combines both first and second grade. At the end of the attendance year, only the second graders move 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 and review it with your team.

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

Not sure which option to use? Here are some examples:

## Continue Current Master Group

When continuing the current master group, you don't 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 can't 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 Move only some individuals.

## 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. During promotion, you must move all records that need to be in the new group. Otherwise, those individuals do not have a record.

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. During promotion, you must move all records that need to be 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're creating a brand new group that mirrors the old one.

If you have a class you won't use in the new group, click **Edit** within the Promotion window and delete the class from the new group.

Since you're deleting the new class that doesn't have any members or markings yet, this doesn't remove any history from that class.

### Promote one individual through View/Edit Class Groups

If you're only promoting one individual to a new class, you can promote the individual through View/Edit Class Groups.

For example, suppose you have a class for single adults, and an individual just got married. You'll want to promote him to the married adults class.

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're promoting 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 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 are saved. No changes are permanent until you complete attendance promotion.

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

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

1. On the Promotion menu, click **Start**.
2. In the **Master Group** drop-down list, select the group to promote.
3. Select **Create New Master Group**, then click **OK**. When the confirmation message displays, click **Yes**.
4. In the drop-down list, select the master group you want to create a new group for, then click **OK**.
5. In the **Group Name** field, enter a group name. If applicable, enter a new **Master Level Name** and **Level 1 Name**. Click **Next**.
6. Select the group options you want to use, then click **Next**.
7. Select the lists to use, if applicable, and click **Next**.
8. Select to **Add Events**, **Setup Detail Marking Fields** and **Add Positions**, if applicable, then click **Next**.
9. Continue creating your new master group. When the **Finish** tab and summary display, click **Finish**.
10. When the Promotion Window Displays, click **Edit** next to the new master group name.
11. Click the **Group Levels** tab, and click **Add**. From here, you will add the Departments, Divisions, and Classes as needed. Once finished, click **OK**.
12. **Optional:** In the Promotion window, click **Map**. In the Promotion Position Map window, make your changes in position promotions, then click **Close**.
13. 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**.
14. In the right group pane, select the class you want to promote an individual to.
15. 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.
16. In the Roster Entry window, select the **Status** and **Position** you want to promote the individual to, then click **OK**.



17. Continue to select individuals from the left roster pane, clicking **Add** after. Be sure to select the **Status** and **Position** for each individual.
18. When finished, click **OK** and **Close**.

1. On the Promotion menu, click **Start**.
2. In the **Master Group** drop-down list, select the group to promote.
3. 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**.
4. Click **OK**, then **Yes**.
5. Enter a new master group name, then click **OK**.
6. **Optional:** In the Promotion window, click **Map**. In the Promotion Position Map window, make your changes in position promotions, then click **Close**.
7. To make changes to the new master group, click **Edit** beside the new master group name.
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**. All individuals must be moved to a class within your new master group.
11. In the Roster Entry window, select the **Status** and **Position** you want to promote the individual to, and then click **OK**.
12. Continue to select individuals from the left roster pane, clicking **Add** after. Be sure to select the **Status** and **Position** for each individual.
13. When finished, click **OK** and **Close**.

1. In the **Master Group** drop-down list, select the group the individual is currently enrolled in.
2. Select the class you want to promote the individual from and select the individual's name.
3. 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**.
4. 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**.
5. 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**.
6. In the **Master Group** drop-down list, select the master group the individual is moving to.
7. Select the class you want to promote the individual to.
8. Select the **Effective Date** you want the individual to be added to the new class, then click **Add**.
9. 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 group in the drop-down list.

**Continue Current Master Group** Continues using the same group and transfer individuals with their current markings into the new year. If you select this, 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** Creates a new group when promoting. When you select to create a new group, the options to copy the current group structure and to include deactivated groups display.

**Copy Current Group Structure** Creates a new group with a structure that mirrors the group structure you've already set up. This is a good option if you want to promote to an existing group, but make a few changes.

**Include Deactivated Groups**- To include all deactivated groups from the group structure you're copying 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** 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're promoting from.

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

### Start Date Options

**Today's Date**- Sets the activation date for the roster changes you selected during promotion as today's date.

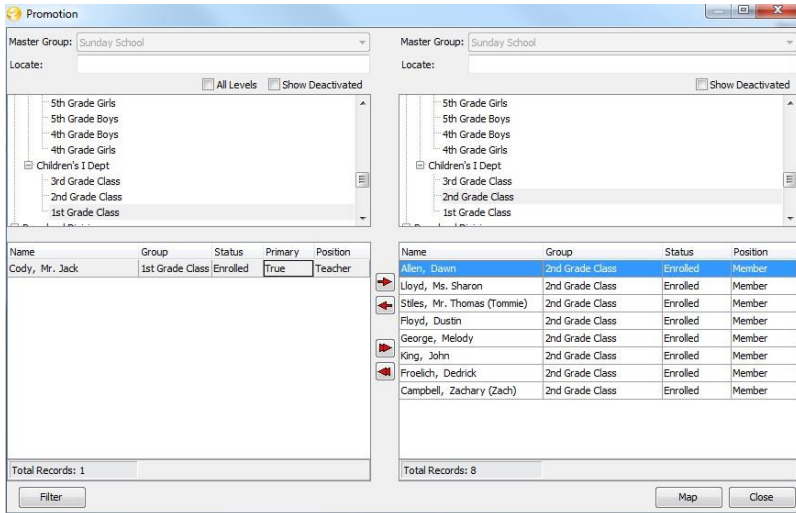
**Group Start Date**- Sets the activation date for the roster changes you selected as the first day of the designated Start Month for the Master Group you're promoting from. The Group Start Date option is not available if the date is not within 60 days of your current system date. In this case, the Start 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.

Current group information displays on the left and next year's information displays 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 select **Continue Current Master Group**, you won't move any individuals who are remaining in the same class. If you do, ACS creates a dropped record and a new record for those individuals inside the same class.

If you select **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.

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**. Or, click **Add All** to select all individuals.
4. In the Roster Entry window, select the **Status** and **Position** for the individual(s), then click **OK**.


You can close and reopen the Promotion window, and the information saves each time. For example, if you move individuals from Nursery through 6th grade to their new classes and need to stop and go to a meeting, all of the individuals you've moved are 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 cannot move forward unless you have an ACS Backup made within the last two days.

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 church administrator works on the Awana Club promotion.

# Completing Attendance Promotion

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





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.

## Printing the Attendance Promotion Proof List

The Attendance Promotion Proof List helps you make sure that the correct people have been moved- and moved to the correct new class. You should print it after moving individuals, but before clicking **Promote**.

This proof list displays old and new class information on one report. 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 them before clicking Promote to complete attendance 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. 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 Report** .

## Printing Next Year's Class Rolls

Printing next year's class rolls helps you make sure that the correct people have been moved to the correct class. You can also print the Attendance Promotion Proof List to check this.


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


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.

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**.

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.

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.

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.


## Changing Attendance Markings in Inquiry

You can change an individual's unposted Attendance 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 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**.



## 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.

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**

## 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.

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** .
- 7.

## 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.
  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** .