



## **Attendance *Training Manual***

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### **Introduction to Attendance Module**

This section provides a general introduction to the Attendance module of Shepherd's Staff.

# Introduction to Attendance Module

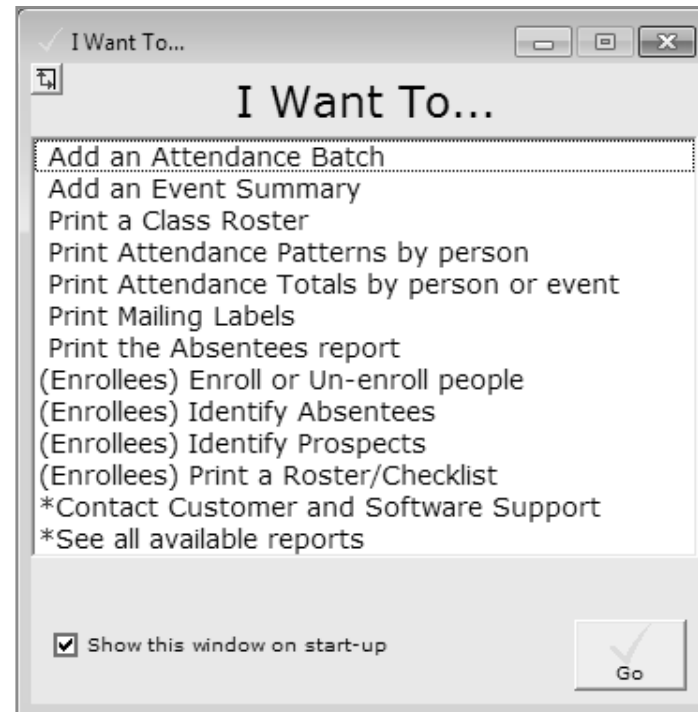
The Attendance module allows you to maintain records of your members' Event attendance. Common tasks include creating and editing Event records, add and posting attendance Batches, and viewing Attendance Reports.

- 1 Attendance Batches
- 2 Event Records
- 3 Event Summary Records
- 4 Attendance Detail Records
- 5 Attendance Summary Records
- 6 Attendance Year Summary Records
- 7 Subgroups
- 8 Reports
- 9 To Do...
- 10 Scheduler—Calendar of Events
- 11 Church Dashboard
- 12 I Want To . . .



## “I Want To . . .” Screen

This window is designed to be a quick shortcut to some of the more popular tasks within the module you are currently in. If you would like to turn off the “I Want To . . .” Screen, you can do so by clicking Desktop on the file menu and making sure “Show the ‘I Want To’ helper on start up” box is unchecked.



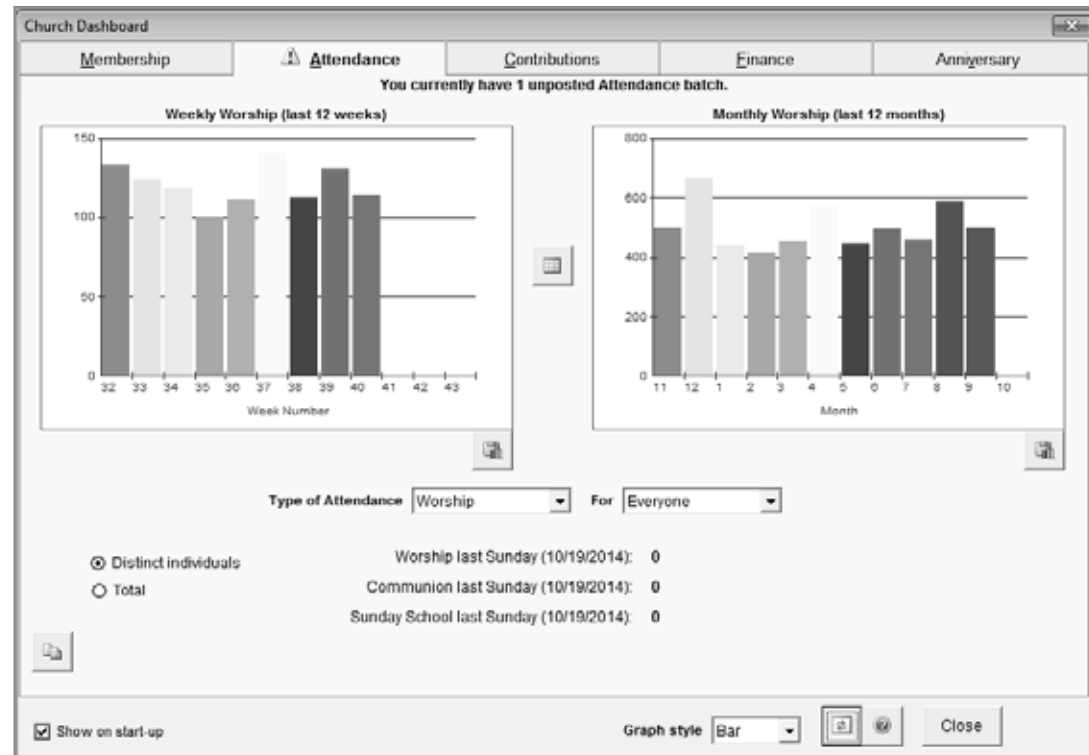
# Church Dashboard

The Attendance tab on the Church Dashboard contains a quick snapshot of your attendance module. This includes information such as how many people have attended both recently and for the entire year.

There are two graphs on this page, one that shows weekly worship and one that shows your monthly worship.

If you look at the bottom of the dashboard, you will find some statistical information for your database. This shows last Sunday's attendance totals for the Worship, Communion, and Sunday School attendance types.

1. To view the dashboard, go to Reports and click Dashboard.
2. You can copy these graphs to another program by clicking the Copy to Clipboard button.
3. The info and question mark buttons will give you the current criteria of the displayed statistics.
4. To update the statistics on the dashboard to reflect a change made in the database, you can close and reopen the dashboard, or you can click the Refresh button at the bottom of the window.



# Customizing the Desktop

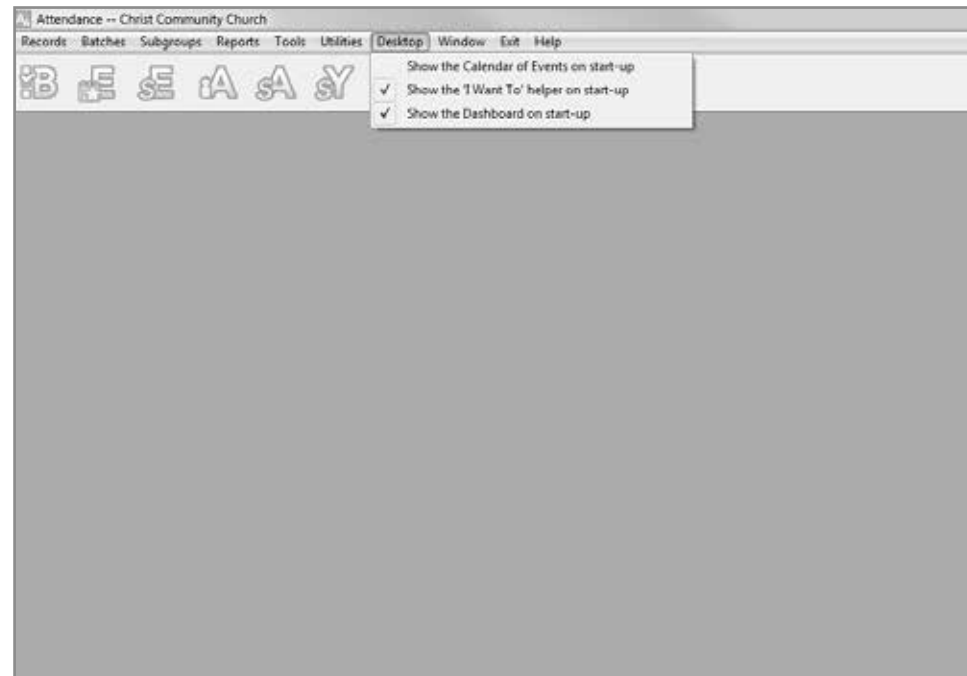
You can customize each of the modules by using the Desktop feature. Each user can customize his or her own desktop.

For example, if the first window you always open in Membership is the Households Grid, you can have the Membership module remember this and open the Households Grid automatically.

To do this, check “Show Households Grid on start-up.”

**Note:** Multiple options may be selected. You can select all six options or any variation of the six options.

1. This feature can be accessed by clicking on Desktop from the toolbar.
2. From here, you can choose which windows you'd like to have open automatically when that module opens, saving you time.





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### **Events and Enrollees**

The first step in working with the Attendance module is setting up your Events. This section will walk you through creating Events as well as all the options including attendance types and enrollees.



## Setting Up Events

The first step in tracking attendance is creating Events. An Event in Shepherd's Staff is defined as any service, program, or happening which people attend. Moreover, if the church wants separate attendance for a service, program, or happening, it must be its own Event.

For example, if you want to know the difference between the attendance for the church's early service and late service, you would need an Event for "Early Service" and an Event for "Late Service." Another example would be holiday services. If you want to know how many people come specifically to the Christmas service every year, you will want an Event called "Christmas Service."

Each Event has its own attendance types and enrollees. We will walk through these items in the following pages.

**Note:** For information on the kiosk and Check-In Setting, see the section on "Shepherd's Staff Check-In" in this manual.

1. To access Event records, go to Attendance, click on Records, and then choose "Events/Enrollees."
2. To add an Event, click the Add button.
3. Start by giving the Event a name and a description.
4. Now we need to assign attendance types.

Turn to the next page in the manual . . .

Event Name	1	2	3	4	5	Enrolled	Active?	Note	Parochial?
▶ Contemporary Worship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	59	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Sunday School	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	29	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
Traditional Worship	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	54	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>

11:00 AM to 12:00 PM

Close Add Edit Delete Sort Preview 3

# Attendance Types

Each Event is categorized under five possible attendance types that help group the Events together.

In order to learn this, we will use the example of a church with two services. The first service is at “8:00 am Sunday” and provides Communion while the second service is at “11:00 am Sunday” and does not provide Communion.

In this case, the first service at 8:00 am would get attendance types of “1. Worship” and “2. Communion” since both of those things are happening during that service/Event. However, the second service at 11:00 am would only receive “1. Worship” since there is no Communion during that Event.

To take this example a step further, let’s say that there is a Sunday School Event at 9:30 on Sunday. This Event would only receive the type of “3. Sunday School” since neither worship nor Communion happen during this Event.

Keep in mind that just because an attendance type is available during an Event does not mean everyone attending that Event uses that type. A visitor or child could attend “1. Worship” during the 8:00 am service but not “2. Communion.” The software has been designed to let you choose which types each individual person attended during the Event.

5. Choose the attendance types you need for this service.
6. (Optional) If you want to rename the attendance types, turn to the next page.
7. The Active check box can be used to “turn on or off” the Event. If the Event is off, it will not show during Batch Event selection. This can come in handy, if, for example, you don’t want your “Christmas Service” to be an option the entire year.
8. Put a check in the “Include in Parochial Report” if your church uses the Parochial Report.
9. Click OK to save the Event.



# Renaming Attendance Types

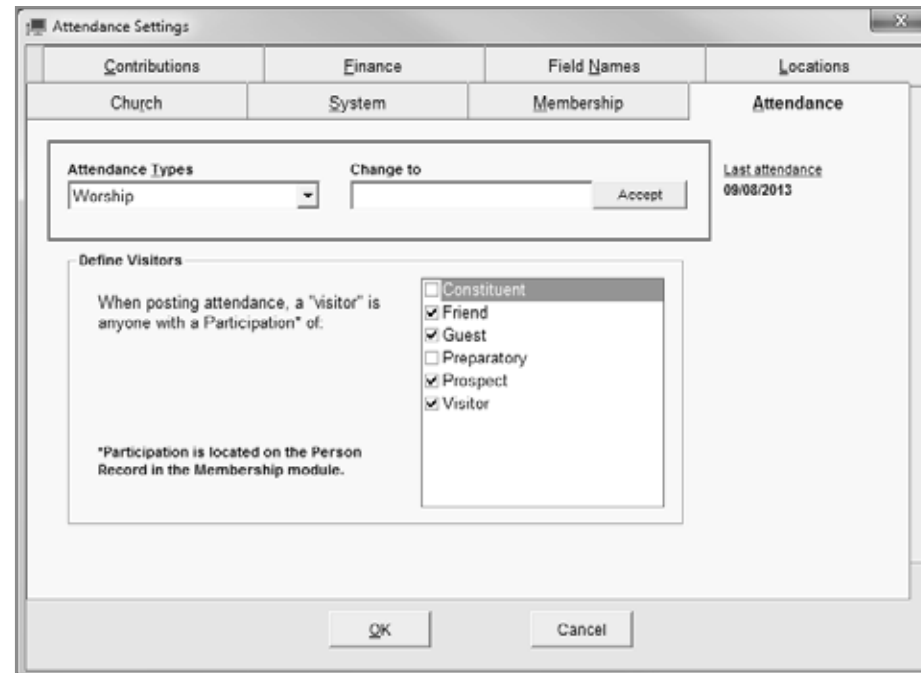
Shepherd's Staff gives you the ability to change the names of your attendance types if you wish to do so.

It's not recommended that you change types 1–3, as much of the software and documentation assumes those are named Worship, Communion, and Sunday School.

However, churches may want to change types 4 and 5. Many churches use these fields for things like meetings, holiday or seasonal, even sporting events.

**Note:** Only System Administrators can rename the attendance types.

1. It's recommended that you create a backup prior to changing any attendance type names. For steps on creating a backup, see the page in the front of this manual called "Backing Up My Data."
2. Go to the Main Menu, click on Utilities and select "Settings."
3. Click on the Attendance Tab.
4. Choose the type you want to change from the Attendance Types dropdown box.
5. Type in what you want to name that type in the Change To field.
6. Click Accept to institute the change.
7. Click Yes to finish.



# Enrollees

Enrollees are defined as people that frequently come to a particular Event. Each Event can have its own set of enrollees, but people can also be enrolled in multiple Events.

This allows you to save time during the Batch entry by displaying these frequent attendees first in their own smaller group.

**Note:** You cannot attach enrollees to an Event until the Event is added.

1. Access Enrollees by selecting an Event and clicking the edit button.
  2. You can add or remove enrollees by editing the specific Event and using one of the following buttons:
    - » **Add**—Allows you to manually select a person and add them to the list.
    - » **Update**—Looks for non-Removed MEMBERS who have attended the Event at least TWO times in the past 30 days. These additions to the list are temporarily prefixed with an asterisk, so that you can easily identify the new enrollees.
    - » **Remove**—Removes one person at a time (the highlighted name) from the list.
  - » **Purge**—Removes enrollees if they have been marked as “Removed By” on their Person records, or if they have not attended the Event during the past 90 days. The Purge button displays a checklist window of anyone it finds, so you can de-select certain individuals you want to keep on the list of enrollees. You can also create a Static Subgroup so that you can follow up with those people.
  - » **Clear**—Completely wipes the list of enrollees.
3. Click OK to save the enrollee list.

