Introduction to Attendance

Introduction to Attendance

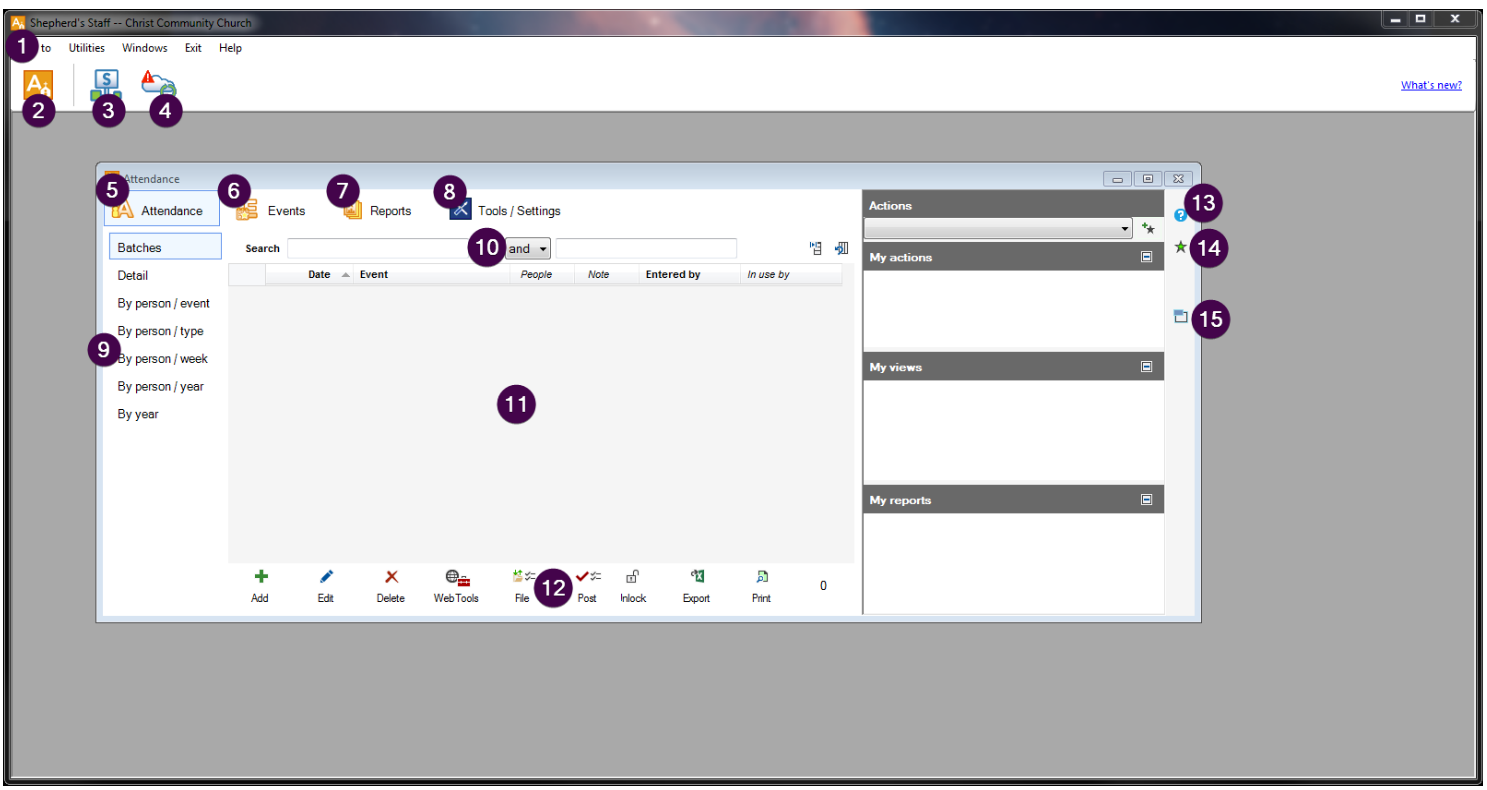
Overview

The Attendance module allows you to maintain records of your members' event attendance. Common tasks include creating and editing event records, adding and posting attendance batches, and viewing attendance reports.

Unlike other modules, Attendance is contained in a single window with a series of tabs and a section under each with a status bar on the right side. This design will become more common in Shepherd's Staff in the future.

Note

At any time, you can press F1 to open the online help article pertaining to the section that is presently being viewed. In addition, a help icon is present in most views and it will also open a help article.



1. Main Menu—The main menu lists various shortcuts, some utilities (mostly customization options), window options, and help information.

2. Attendance Module—Clicking this will open the Attendance window.

3 Subgroups—This opens the subgroup module, where subgroups can be created, edited, and viewed.

4 WebTools—If your church has a registered database and an active support contract, you can enter attendance online and then sync it with the Attendance module. Clicking this icon will open the WebTools manager and allow you to sync attendance batches with Shepherd's Staff.

5 Attendance Tab—This tab contains batches and attendance details that are separated in various ways, like by year and type.

6 Event Tab—The event tab contains information regarding events at your church. This includes a list of all events separated by date, year, and enrollees.

7 Reports Tab—This tab contains all reports that can be generated from the information in the Attendance module. Don't be surprised by the small list. Every section can be turned into a report that can be saved and generated at any time.

8 Tools/Setting Tab—This tab is visible only to those with supervisor permissions. It contains various tools and options concerning the Attendance module.

9 Tab Sections—Each tab has a unique list of sections that will display various pieces of data. These sections take the place of the multitude of buttons in previous versions of Shepherd's Staff.

10 Search and Filters—Each data grid can be searched using various methods, including specific dates, ranges, names, and other keywords. This feature is so robust it will be covered in a separate article. In addition, most data grids will have filters that can be applied to narrow down the data.

11 Data Grid—The data grid contains all the information that relates to the selected section. Each column can be rearranged, resized, and sorted.

12 Command Line—The command line contains all options for the section that is presently being viewed. These options vary between sections, but all can be exported to Excel, printed, and saved for future use, and each has a count of the total lines of data.

13 Help Icon—Clicking this icon will open the online help center in your default browser. This button will appear on various windows and will open the help article that is most closely related to the window you are presently viewing.

14 Favorites—The favorites panel appears and disappears by clicking the star icon. It has four sections that list various actions, saved actions, views, and reports. This feature will be covered in more detail in another article.

15 Float Window—This button allows the Attendance module to be dragged onto a different monitor if your computer has multiple screens.

Search and Filters

Overview

Each data grid in Shepherd's Staff® has a search box and usually also a filter. The search box and filter can be used to narrow down the large amount of data that can appear in grids. In addition to standard text, search utilizes various special characters to create unique searches. After the search and filter are applied, the view can then be saved to create a report or to save it for future use.

> **Note**
>
> The search function only searches data that is in columns with bold headers.

The search and filter options can be found above the data grid. There are two search fields. With the use of special characters, the **and/or** function can be used in creative ways to find different data. For example, a user could type **>11/15/2017** in the first search box to find dates after November 15, 2017, then select **and** and enter **=Smith** in the second search box. This would search for records after November 15, 2017, for just people with the name "Smith".

These are the special characters you can use in searches:

» Equal (**=**)—Putting **=** before a search value causes the search to perform an exact match on the specified value. Example: **= Johnson**.

» Greater than (**>**)—Putting **>** before a search value searches for values greater than the one you type in. Example: **>12/01/2017** searches for dates after December 1, 2017.

» Less than (**<**)—Putting **<** before a search value searches for values less than the one you type in. Example: **<12/01/2017** searches for dates before December 1, 2017.

» Pipe (**| or shift + **)—Lets you search for a range, e.g. between two values. Example: **04/01/2018 | 04/15/2018** searches date columns for dates between April 1 and April 15, 2018.

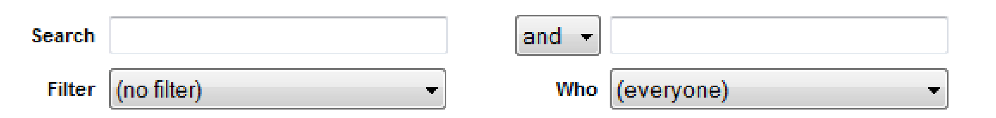
» At (**@**)—Prefixing a value with **@** suspends the auto-data-type logic, so that you can search for a number or date stored in a text field. An example of this need is in the attendance **By person/week** grid, where using **@** allows you to search for a portion of an attendance pattern.

Filters can also be applied with or without search. These filters change depending on the nature of the data that is being displayed. These drop-downs can be selected at any time to filter the data to match the selection. The most common filter is **Who**. This drop-down lists various groups of members, like current members, non-members, or people from various lists and subgroups.

> **Tip**
>
> Pressing F5 will clear all search fields and any filters

Here is how to use the search and filters:

1. Select the **tab** and **section** you want to search in.
2. Above the data chart, enter into the **search field** the information you would like to search for. Click the **red "x" icon** next to the search field to clear it.
3. Select any options from the various **filter drop-downs** to filter the information.
4. Click **save** in the command line to save the view for future use.



Favorites

Overview

The new favorites panel takes the place of the "I Want To…" window in the previous versions of Shepherd's Staff®. This window can be displayed or hidden by clicking the **star icon** on the right-hand side of the window. The favorites are saved by each user, so different users can have different favorites. The favorites panel is broken up into four sections.

» Actions—A drop-down that lists the various actions that can be taken in the module. Selecting an option will change the**tab** and **section** to the corresponding view and open any windows so the action can be completed.

» My Actions—A list of actions that are saved by the user. You can save an action by selecting the action from the **Actions** drop-down and then clicking the **star icon** next to the drop-down.

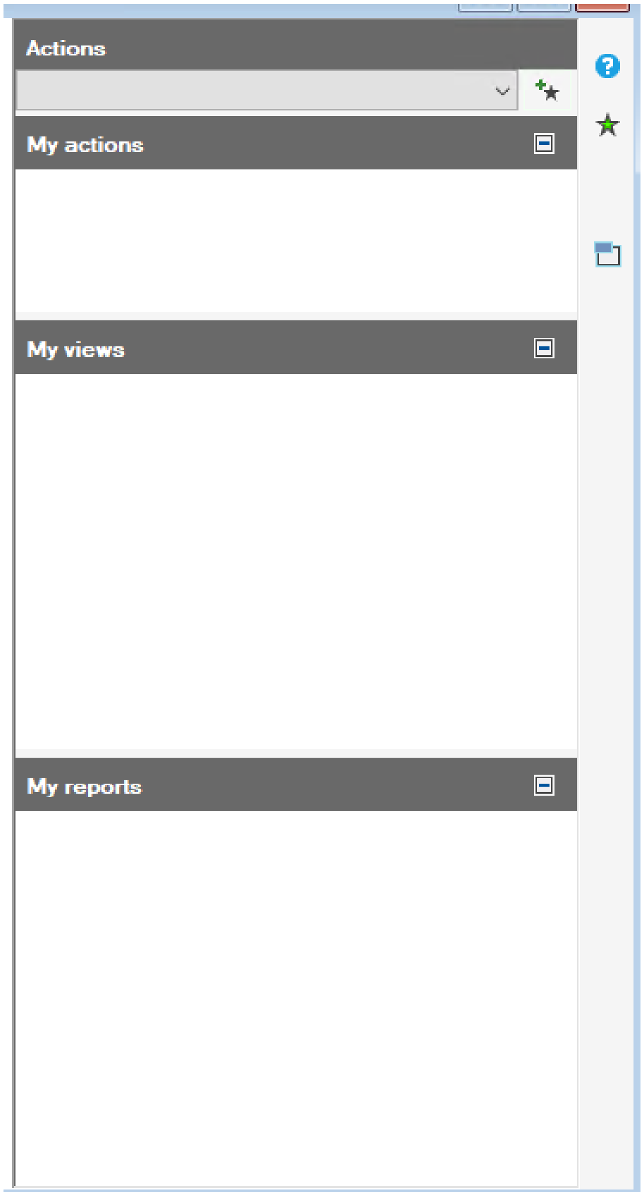
» My Views—This lists the views that the user has saved. Saving a view will save all filters and searches made when the view was saved. Any view can be saved by clicking the **Save** button on the command line.

» My Reports—These are reports that have been previously saved. Each saved report will retain all the original settings and formatting options. Reports can be saved at any time by clicking the **Save** button in the lower right-hand corner of the module window.

A variety of options can be taken by right-clicking on a favorite. You can sort the favorites, rename them, and delete them. You also can reorder your favorites by dragging and dropping them into a new order. Sections of the favorites can be hidden by clicking the **minimize** icon in the section header.

Here is how to use favorites:

1. Select a view and click **save** in the command line.
2. **Name** and **save** the new view.
3. Repeat this process for any view or report.
4. Rename a favorite by **right-clicking** on it and selecting **rename**.
5. Delete a favorite by **right-clicking** on it and selecting **delete**.
6. Reorder your favorites by dragging them into a new order.


Actions
My actions
My views
My reports

The Data Grid

Overview

Most views in each module contain a data grid. Almost every record you add to Shepherd's Staff® will be contained within a grid. Grids have special features that, when used, can greatly increase the user's proficiency and speed.

Key Parts

» Searches and Filters—Searches and filters can be used to narrow down search results or to search for a specific person or data.

» Autofit Columns and Reset—These two buttons in the upper right corner of the grid view will automatically adjust the column width to fit all data or reset the grid to default layout and size.

» Column Headers—Column headers come in two different types, bolded and italic. Bolded headers are for data that can be searched for. Italic headers are not used in searches.

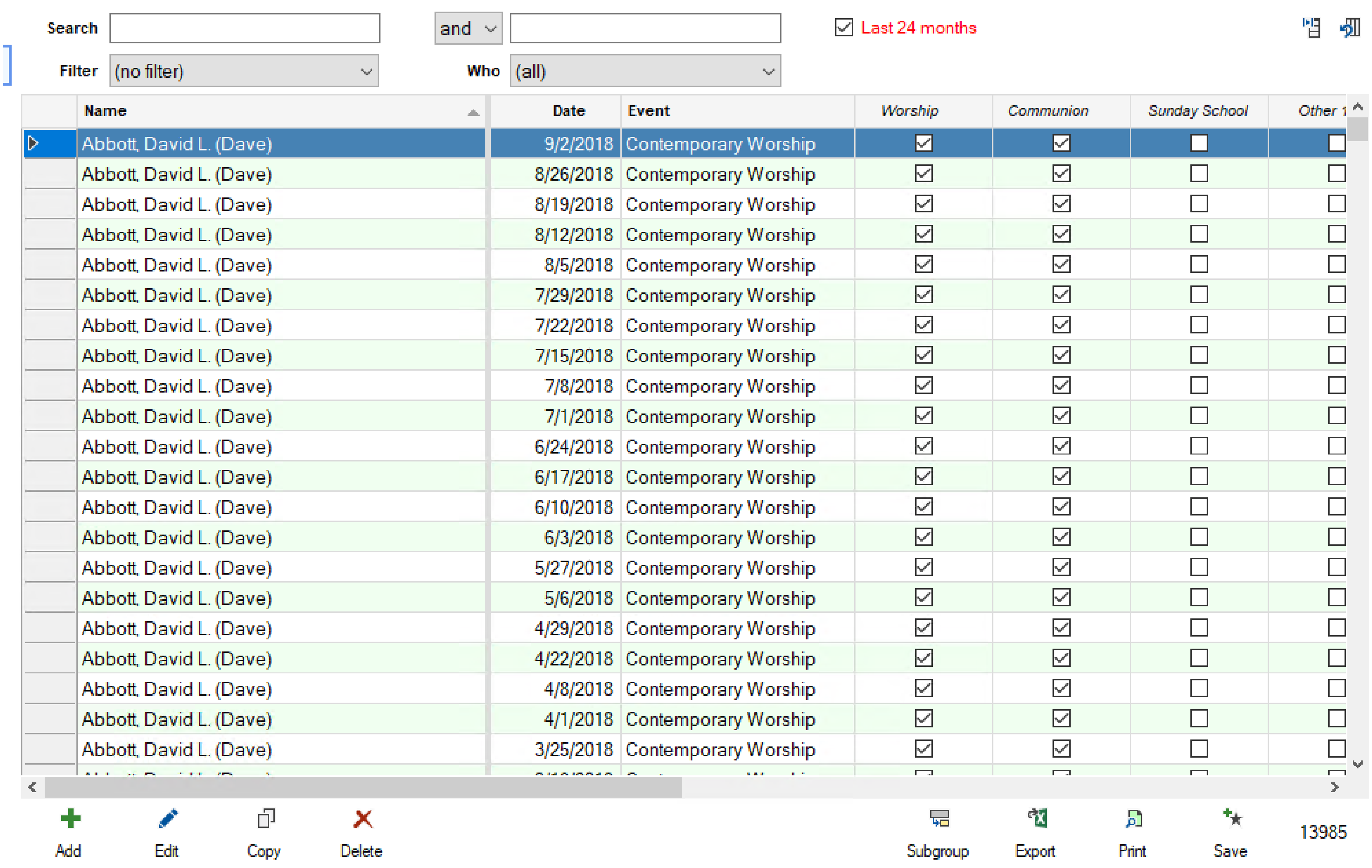
» Sorting Columns—All columns can be sorted in ascending or descending order by clicking the header. Only one column can be sorted at a time, but it is usually assumed that when you sort by an event or date that the names will be sorted into alphabetical order.

» Moving Columns—Columns can be moved to the left or right to customize the grid. Click and drag the column header to move the column, then let go to put it in place. These columns will be saved in the new order and will appear in the same order each time you open the module.

» Resizing Columns—Columns can be resized to display more or less data. This can be done by moving the mouse between two column headers and then dragging once the resize cursor appears.

» Frozen Columns—In each data grid, the name column is listed on the far left and stays fixed as the grid is scrolled to the right or left. Unlike in other versions of Shepherd's Staff, this is the only column that can be frozen.

» Command Line—The command line contains all available options for the section that is presently being viewed. These options vary between sections, but all views can be exported to Excel, printed, and saved for future use, and each has a count of the total lines of data.

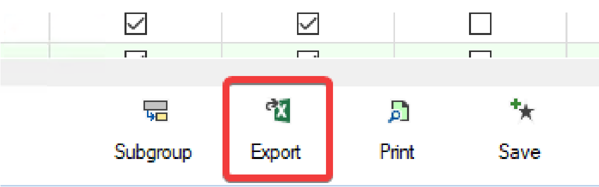

Search
and
Last 24 months
Filter
(no filter)
Who
(all)
Name
Date
Event
Worship
Communion
Sunday School
Other 1
Abbott, David L. (Dave) 9/2/2018 Contemporary Worship
Abbott, David L. (Dave) 8/26/2018 Contemporary Worship
Abbott, David L. (Dave) 8/19/2018 Contemporary Worship
Abbott, David L. (Dave) 8/12/2018 Contemporary Worship
Abbott, David L. (Dave) 8/5/2018 Contemporary Worship
Abbott, David L. (Dave) 7/29/2018 Contemporary Worship
Abbott, David L. (Dave) 7/22/2018 Contemporary Worship
Abbott, David L. (Dave) 7/15/2018 Contemporary Worship
Abbott, David L. (Dave) 7/8/2018 Contemporary Worship
Abbott, David L. (Dave) 7/1/2018 Contemporary Worship
Abbott, David L. (Dave) 6/24/2018 Contemporary Worship
Abbott, David L. (Dave) 6/17/2018 Contemporary Worship
Abbott, David L. (Dave) 6/10/2018 Contemporary Worship
Abbott, David L. (Dave) 6/3/2018 Contemporary Worship
Abbott, David L. (Dave) 5/27/2018 Contemporary Worship
Abbott, David L. (Dave) 5/6/2018 Contemporary Worship
Abbott, David L. (Dave) 4/29/2018 Contemporary Worship
Abbott, David L. (Dave) 4/22/2018 Contemporary Worship
Abbott, David L. (Dave) 4/8/2018 Contemporary Worship
Abbott, David L. (Dave) 4/1/2018 Contemporary Worship
Abbott, David L. (Dave) 3/25/2018 Contemporary Worship
Add
Edit
Copy
Delete
Subgroup
Export
Print
Save
13985

Exporting a Grid

Overview

Since all data grids contain rows and columns, all grids can be exported as an Excel document that can be opened in any spreadsheet application. By default, Shepherd's Staff® will attempt to open the document in Excel. However, in the main Shepherd's Staff settings under the locations tab (navigate to **Utilities** on the main menu > **Settings** > **Locations**), you will find a field to change the default spreadsheet application. The exported data grid will not have the columns ordered as they are in Shepherd's Staff. The data will be sorted by name only. You will need to edit the document to reorder, sort, or remove columns.

To export any view, click the **Export button** in the command line.



Print Preview

Overview

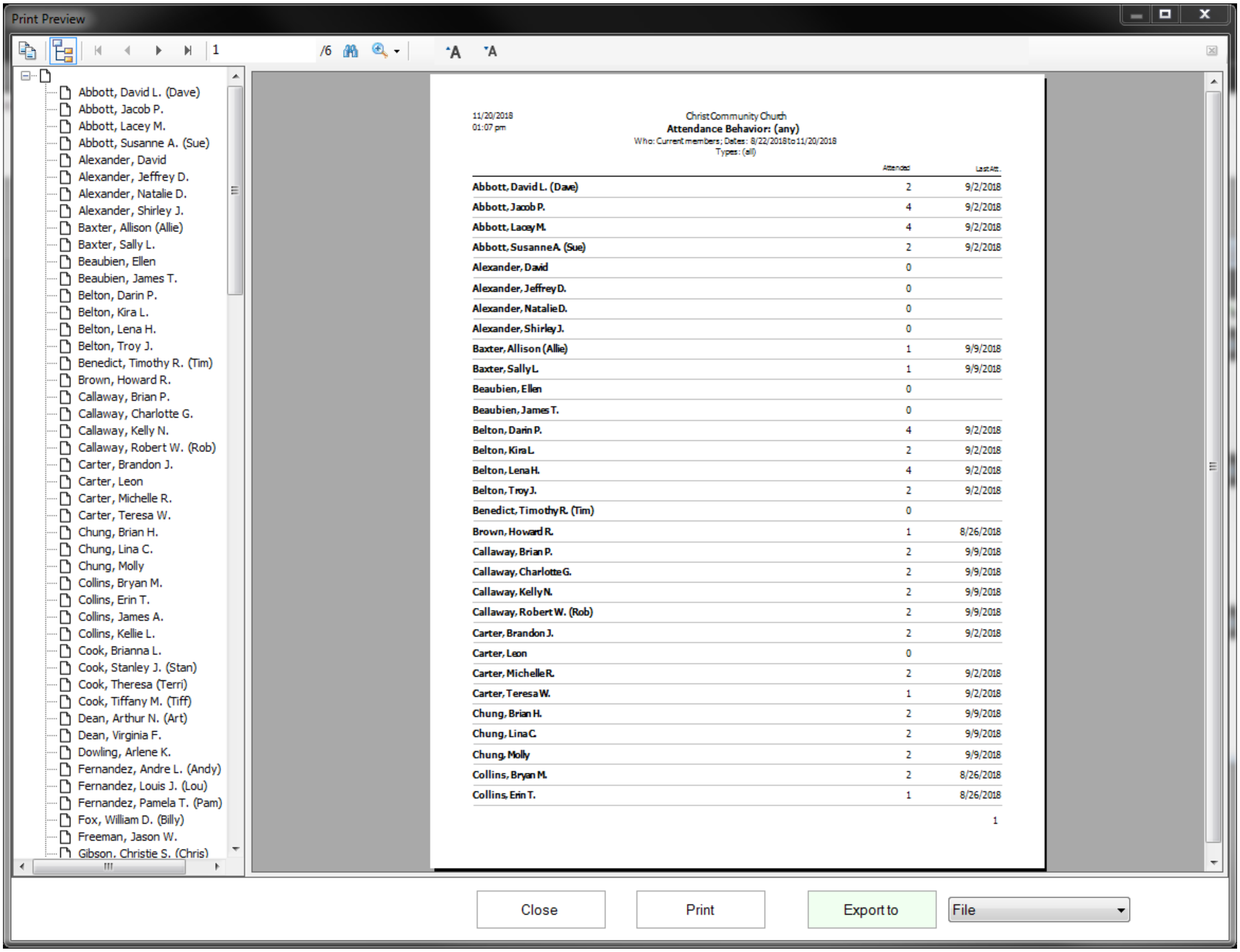
Similarly to how each data grid can be exported, each view and report can be printed or exported in a variety of different formats. Before a view is printed, though, a preview will display.

In the print preview, the top tool bar contains several options to help you navigate the preview before you print it. A tree is available on the left side of the screen to navigate to a specific section of the preview. **Arrows** allow you to cycle through the pages, the **binocular icon** can be used to search the document for specific data, and a **magnifying glass** can be used to zoom in and out to view the data better. Two buttons allow you to increase and decrease **font sizes**. In some reports, like Attendance by Event, you can double click to drill down into the report to view additional details.

At the bottom of the print preview, you can **close**, **print**, and **export** the preview. All previews can be exported in a variety of different file types, including Word, RTF, and PDF. Word and RTF documents can be edited in any word processor application.

Here is how to use the print preview:

1. View any section or report.
2. Select the **Print icon**. In many views, you will need to select a **Group by** option, which orders the data by groups to create different types of reports.
3. In the preview that appears, use the **arrows** in the tool bar to cycle between pages.
4. Use the **icons to increase or decrease the font size** to make the preview comfortable to read.
5. If you want to export the report in a different format, select the drop-down menu in the lower right corner and **select the format**, then select **Export**.
6. To print the report, click the **Print**



11/20/2018
01:07 pm

Christ Community Church
Attendance Behavior: (any)
Who: Current members; Dates: 8/22/2018 to 11/20/2018
Types: (all)

	Attended	Last Att.
Abbott, David L. (Dave)	2	9/2/2018
Abbott, Jacob P.	4	9/2/2018
Abbott, Lacey M.	4	9/2/2018
Abbott, Susanne A. (Sue)	2	9/2/2018
Alexander, David	0	
Alexander, Jeffrey D.	0	
Alexander, Natalie D.	0	
Alexander, Shirley J.	0	
Baxter, Allison (Allie)	1	9/9/2018
Baxter, Sally L.	1	9/9/2018
Beaubien, Ellen	0	
Beaubien, James T.	0	
Belton, Darin P.	4	9/2/2018
Belton, Kira L.	2	9/2/2018
Belton, Lena H.	4	9/2/2018
Belton, Troy J.	2	9/2/2018
Benedict, Timothy R. (Tim)	0	
Brown, Howard R.	1	8/26/2018
Callaway, Brian P.	2	9/9/2018
Callaway, Charlotte G.	2	9/9/2018
Callaway, Kelly N.	2	9/9/2018
Callaway, Robert W. (Rob)	2	9/9/2018
Carter, Brandon J.	2	9/2/2018
Carter, Leon	0	
Carter, Michelle R.	2	9/2/2018
Carter, Teresa W.	1	9/2/2018
Chung, Brian H.	2	9/9/2018
Chung, Lina C.	2	9/9/2018
Chung, Molly	2	9/9/2018
Collins, Bryan M.	2	8/26/2018
Collins, Erin T.	1	8/26/2018

1

Customizing Attendance

Overview

Each module can be customized in minor ways in Shepherd's Staff®. Many customizations are done automatically, and all are saved so they appear the same way every time you open the module. Below are some of the ways to customize your experience.

» Background Color—The background in any module can be set to any color you wish. In the specific module, select **Utilities** in the top navigation and then **Change background color**. A window will appear with some basic colors already selected. For more options, select **Define Custom Colors**. This will bring up a color picker, where you can pick any color.

» Column Order and Sizes—You can reorder and resize columns in every data grid to whatever configuration is most useful to you. This can be done by clicking a column header and dragging it to the spot you want. The columns will always be in the same order every time you open the module. These options can be reset in each view by selecting the **reset button** in the upper right corner of the view.

» Favorites—Each user can have a variety of favorites saved, like different views, reports, and even specific actions.

» Window Size and Locations—Shepherd's Staff will remember where each window was last placed on the screen and how large the window was. This option can be reset under **Utilities** in each module or under **Utilities** > **Settings** in the main menu.

WebTools Sync

Overview

Keeping your database synced with WebTools is important so your data is kept up to date. An icon in the navigation bar in the Attendance module allows you to quickly sync WebTools at any time.

When you sync WebTools, data from your database is sent to a server. The data includes church name, church address, person name, event names and info, enrollees, and contributions information.

> **Note**
>
> Before you can sync WebTools, you must register your database and have a current support plan.

Key Parts

» **Sync button**—Clicking this button will sync all the information in your WebTools site with your Shepherd's Staff database. This sync needs to be done only when you have new members, households, envelope numbers, events, or contributions information.

» **Website icon**—Clicking this will open your WebTools site in your default browser.

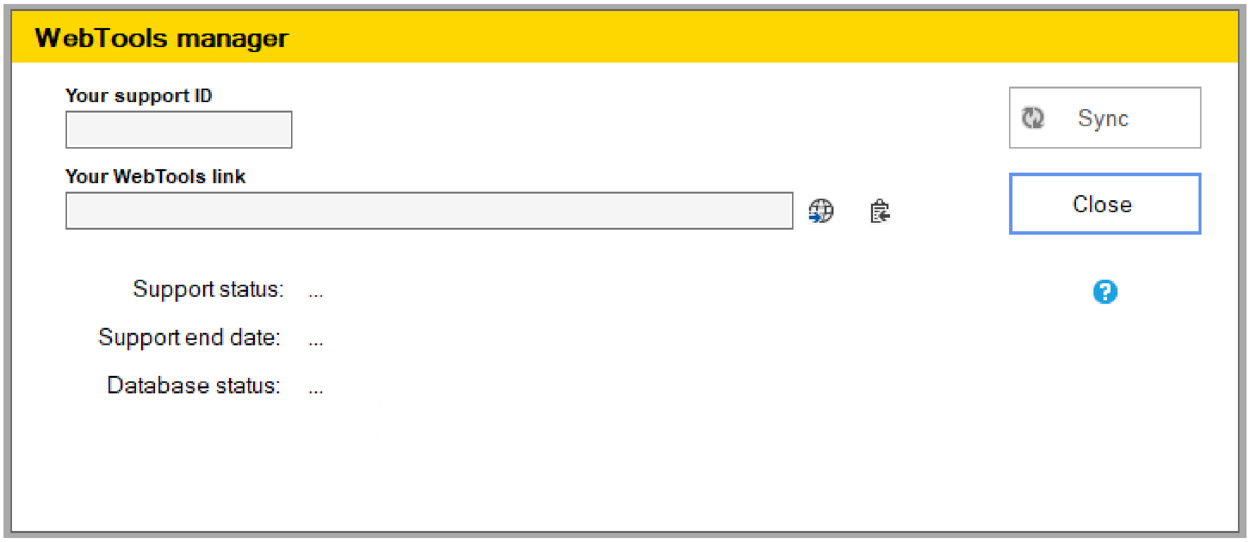
» **Copy URL icon**—Clicking this will copy your WebTools URL. You can then paste the URL to share it with others.

» Other information—Below the WebTools URL is information like **support status**, **support end date**, and **database status**. It's normal for these fields to not display information. Before the sync is complete, Shepherd's Staff confirms this information and displays it then.

Here is how to sync WebTools:

1. Open the Attendance module.
2. Click the **WebTools icon** in the top navigation. This icon will have a red symbol added if you need to sync your WebTools site.
3. Click **Sync**. A screen will show up and disappear once the sync is complete.
4. To import the batch, select **WebTools** from the command line at the bottom of the batch view.

5 Select the **batch you want to import**, and click **Import**.



Attendance

- Batches
- Advanced Batch Entry
- Basic Batch Entry
- Import and Export Batches
- Detail
- By Person/Event
- By Person/Type
- By Person/Week
- By Person/Year
- By Year
- Attendance Summary
- Year Summary
- Worship Pattern
- Adding an Event Head Count

Batches

Overview

An attendance batch is used to add the attendance for an entire event. This allows you to select multiple people to show they attended the event, which then creates attendance records for each person. This is used to track attendance throughout the year for reports.

There are multiple ways to enter a batch into Shepherd's Staff. There are two different versions of batch entry (Advanced and Basic), along with WebTools, and the ability to import a file. Once a batch is created, it must be posted before the attendance records are added. Once a batch is posted, options for editing it become very limited, so be sure to have all attendance entered correctly before posting the batch.

If a batch is posted on mistake, all attendance records and event records must be deleted, and the batch must be recreated. If only a couple of people are missing from the batch, entering the attendance from the detail view is the easiest method. If the batch was posted for the wrong event, date, or type, you can use the Fix attendance posting mistake utility.

> **Note**
>
> Batches can be edited by only one person. If you are using a networked database, having more than one person edit a batch will cause errors and possibly corrupt the data once the batch is posted. Because of this, there is now a field on the batch view that displays who is editing the batch.

Key Parts

» Add—Opens a new window where you can select the event, date, and entry method. This window will also display the last time the event occurred.

» Edit—Edits the selected batch. This is also how you can change the entry method.

» Delete—Removes the selected batch. This cannot be undone.

» Post—Submits the selected batch, and creates an event record and attendance records for all people who attended.

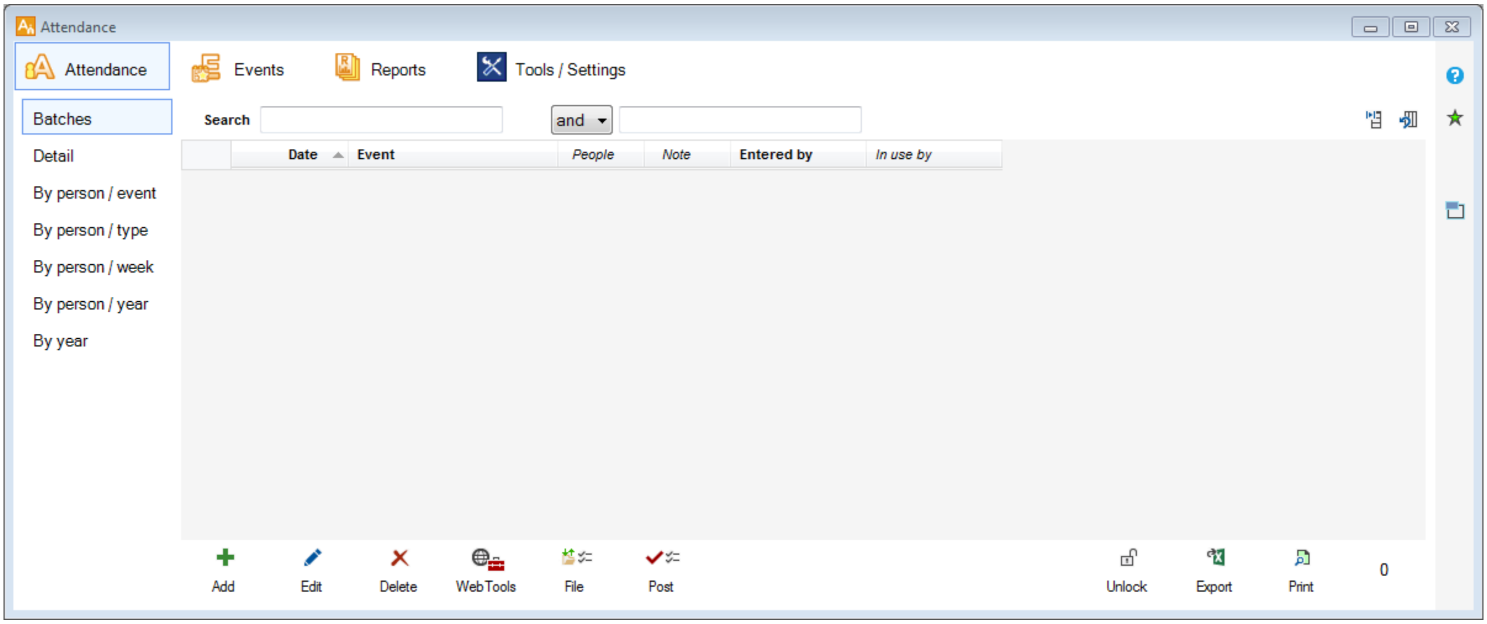
» WebTools—This button opens a window where you can select the batches that have been completed in WebTools and import them into Shepherd's Staff. WebTools needs to be synced for batches to appear in this window.

» Unlock—Unlocks the batch. If a batch is being edited by another user on a network, the batch becomes locked. This means no one else can edit it until the other user is finished. Before clicking the *Unlock* button, confirm no one else is working with the batch. If two people enter attendance into the same batch, the database can become corrupt.

» File—Clicking this opens a window allowing you to import and export batches. This is used if you create batches from a remote location but do not have access to WebTools.

» Export—Exports the batch grid to an Excel file.

» Print—Creates a batch report and opens the print preview that lists all the attendees for the selected batch.



Advanced Batch Entry

Overview

The Advanced Batch Entry is the same as the traditional batch entry from older versions of Shepherd's Staff. After selecting a service type and date, you can select people from a list of possible attendees and then add them to the list of attendees in the batch. Possible attendees can be filtered by various options like current members, all members, enrollees, and those in specific subgroups or lists. After all attendees have been added to the batch, you can post the batch and save it to the database.

> **Note**
>
> Once a batch is posted, the options to edit the batch are limited. You can change the date, event, and type using the Fix Attendance Mistakes utility. To add people to the batch, you will have to add them one at a time by adding an Attendance Detail. Alternatively, you can delete all attendance details and the record in the **By date** category of the **Events** tab, then add the batch again.

Key Parts

» Event summary—The event name and date are listed in the upper left corner.

» Possible Attendees—This is a list of people who may have attended the event. This list can be changed by selecting a different group in the **Who?** drop-down. Above this section is a search bar that can be used to find a specific household or person (depending on the **Search by** selection).

» Who?—This drop-down filters out people based on various options, like current members (those not labeled as inactive in the Membership module), enrollees, or non-members, and you can select people from various lists and subgroups.

» Event types—If there are multiple types listed for the event you are entering attendance for, the types will be listed between the **Possible Attendees** and **Attendees in batch** sections of the batch entry view. Selecting a type will add future people with only that type listed. This is useful for distinguishing who attended worship but did not commune.

» Add, Add all, Remove, and Remove all—These buttons add and remove people from the batch. Selecting people from **Possible Attendees** and clicking **Add** will add them to the **Attendees in batch** section. Selecting people from **Attendees in batch** and clicking **Remove** will remove them from the batch. Clicking **Add all** and **Remove all** adds and removes everyone in mass.

» Add visitor—Clicking this will bring up a window where you can quickly add a visitor to Shepherd's Staff. The name field is the only required field and the record will show up in the Membership module. Any notes added this way can be found on the household record for the new visitor added.

» Search by—This selection changes how the **Possible Attendees** are sorted and how the search functions.

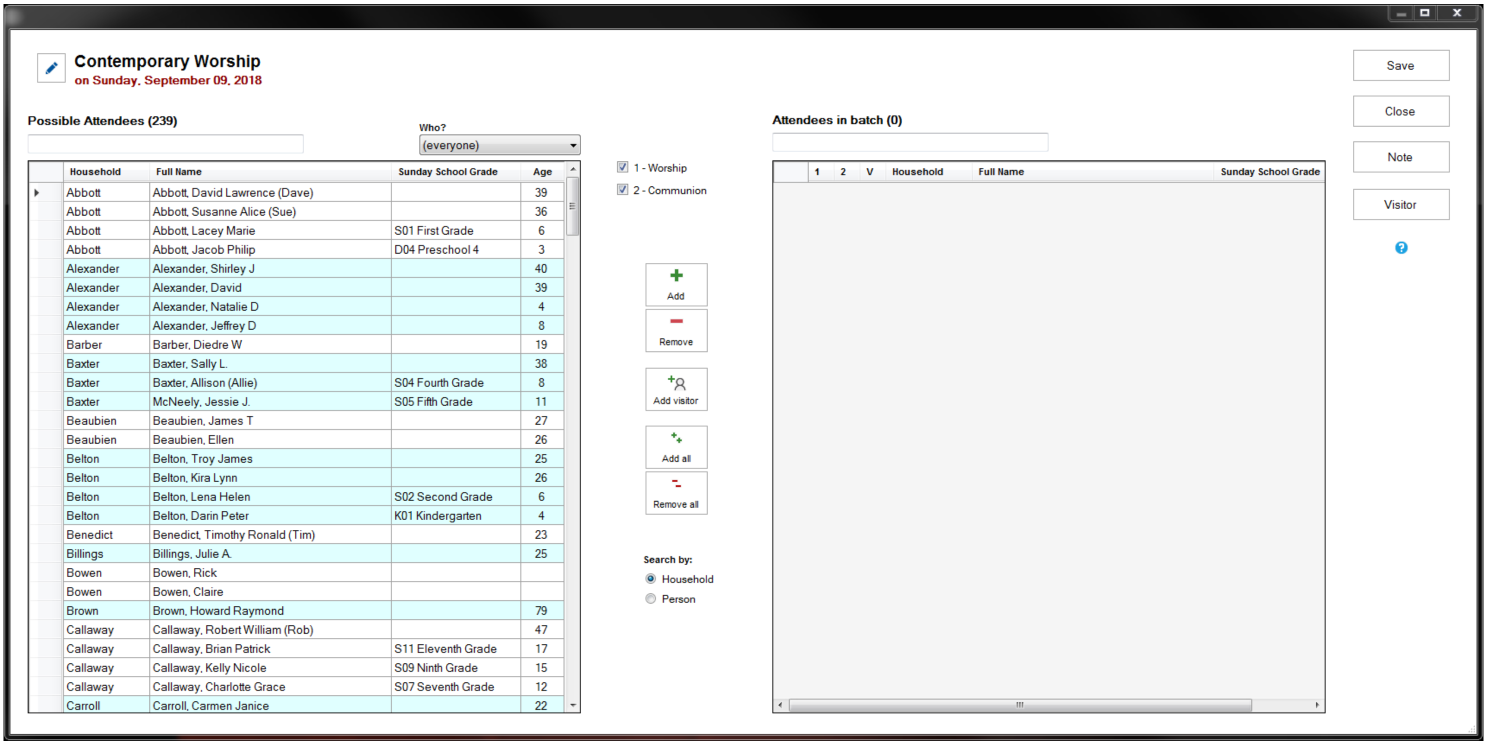
» Attendees in batch—This list contains all the people who are presently marked as having attended the event.

» Note–Attaches a note to the batch that can be viewed in the future. This note can contain anything.

» Visitors–Allows you to add a visitor head count to the batch if you have unknown visitors. You can add a count to any event type which will allow you to track both attendance and communion numbers separately.

Here is how to add a batch using the Advanced Batch Entry:

1. Open the Attendance module and select the **Attendance tab,** then select the **Batches section**. This should be the default view when the module is opened.
2. Click **Add**.
3. **Select an event** and the **date** of the event. Select **Advanced** under the entry method heading on the right.
4. Click **Continue**. The batch entry window will appear.
5. Under **Possible Attendees**, you can use the **Who?** drop-down and the **search bar** to filter specific individuals. In addition, the list can be sorted by selecting either **Household** or **Person** under **Search by** in the middle of the view.
6. Select individuals in the **Possible Attendees** column and select **Add** to move them to the **Attendees in batch** Be sure the correct event type is selected if the event has multiple types listed in the middle of the screen.
7. To remove an attendee, select the person in the **Attendees in batch** column and click **Remove**.
8. Add any **notes**.
9. Click **Save**.


Contemporary Worship
on Sunday, September 09, 2018
Save
Close
Note
Visitor
Possible Attendees (239)
Who?
(everyone)
Household
Full Name
Sunday School Grade
Age
Abbott Abbott, David Lawrence (Dave) 39
Abbott Abbott, Susanne Alice (Sue) 36
Abbott Abbott, Lacey Marie S01 First Grade 6
Abbott Abbott, Jacob Philip D04 Preschool 4 3
Alexander Alexander, Shirley J 40
Alexander Alexander, David 39
Alexander Alexander, Natalie D 4
Alexander Alexander, Jeffrey D 8
Barber Barber, Diedre W 19
Baxter Baxter, Sally L. 38
Baxter Baxter, Allison (Allie) S04 Fourth Grade 8
Baxter McNeely, Jessie J. S05 Fifth Grade 11
Beaubien Beaubien, James T 27
Beaubien Beaubien, Ellen 26
Belton Belton, Troy James 25
Belton Belton, Kira Lynn 26
Belton Belton, Lena Helen S02 Second Grade 6
Belton Belton, Darin Peter K01 Kindergarten 4
Benedict Benedict, Timothy Ronald (Tim) 23
Billings Billings, Julie A. 25
Bowen Bowen, Rick
Bowen Bowen, Claire
Brown Brown, Howard Raymond 79
Callaway Callaway, Robert William (Rob) 47
Callaway Callaway, Brian Patrick S11 Eleventh Grade 17
Callaway Callaway, Kelly Nicole S09 Ninth Grade 15
Callaway Callaway, Charlotte Grace S07 Seventh Grade 12
Carroll Carroll, Carmen Janice 22
1 - Worship
2 - Communion
Add
Remove
Add visitor
Add all
Remove all
Search by:
Household
Person
Attendees in batch (0)
1
2
V
Household
Full Name
Sunday School Grade

Basic Batch Entry

Overview

The Basic Batch Entry is a simplified attendance-entry method and is similar to how Church360° Members® does attendance batch entry. Instead of two columns where people are transferred from one to another, you will see names listed horizontally by household. You can select people by clicking on their names.

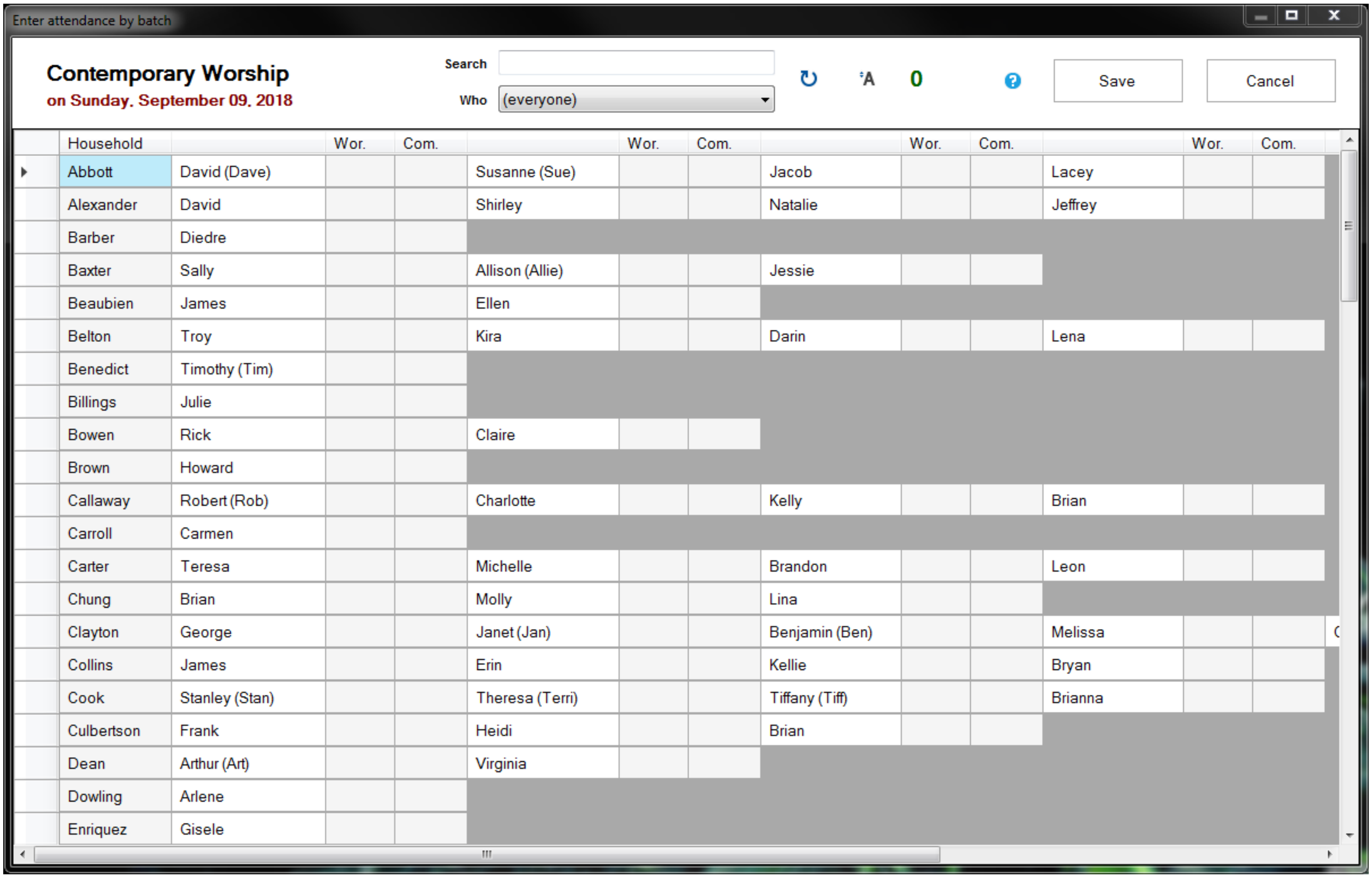
In this view, only names are displayed. Other information like grades and ages are not shown. Filters are also limited to basic categories; options like lists and subgroups are unavailable. A huge advantage of this screen, though, is that it works well on touch-screen devices.

The Basic Batch Entry view lists all people by household. People can be marked as attended by clicking on the first name or the household name. Clicking the household name will mark every person in the household as attended. For events with multiple types of attendance, there will be a column for each type, and you can mark each column separately to show what the person participated in. This is how you will mark those who attended worship but did not commune.

At the top of the view, you will see a search bar and a filter drop-down. Next to these is a refresh button, which will remove any searches or filters. Then there is a font-size button, which will cycle through different font sizes. Next is a count of the number of people who attended. On the right are a help icon and buttons to save and cancel.

Here is how to enter attendance using the Basic Batch Entry method:

1. Open the Attendance module and select the **Attendance tab,** then select the **Batches section**. This should be the default view when the module is opened.
2. Click **Add**.
3. **Select an event** and the **date** of the event. Select **Basic** under the entry method heading on the right.
4. Click **Continue**. The batch entry window will appear.
5. Select the **Household** name to add all people in the household, or select the **Person** name to add an individual person. You also can select the worship type next to a person's name to mark the person as attended.
6. Use the **Search** and **Filter** to narrow down people.
7. When you are finished, click **Save**.



Enter attendance by batch

Contemporary Worship
on Sunday, September 09, 2018

Search
Who (everyone)

0

Save
Cancel

Household		Wor.	Com.		Wor.	Com.		Wor.	Com.		Wor.	Com.
Abbott	David (Dave)			Susanne (Sue)			Jacob			Lacey		
Alexander	David			Shirley			Natalie			Jeffrey		
Barber	Diedre											
Baxter	Sally			Allison (Allie)			Jessie					
Beaubien	James			Ellen								
Belton	Troy			Kira			Darin			Lena		
Benedict	Timothy (Tim)											
Billings	Julie											
Bowen	Rick			Claire								
Brown	Howard											
Callaway	Robert (Rob)			Charlotte			Kelly			Brian		
Carroll	Carmen											
Carter	Teresa			Michelle			Brandon			Leon		
Chung	Brian			Molly			Lina					
Clayton	George			Janet (Jan)			Benjamin (Ben)			Melissa		
Collins	James			Erin			Kellie			Bryan		
Cook	Stanley (Stan)			Theresa (Terri)			Tiffany (Tiff)			Brianna		
Culbertson	Frank			Heidi			Brian					
Dean	Arthur (Art)			Virginia								
Dowling	Arlene											
Enriquez	Gisele											

Import and Export Batches

Overview

This utility allows you to export and import an unposted Batch. This is useful for users who do not have access to WebTools and want to enter attendance from a separate location. The utility will export a file that can be put onto a flash drive or a cloud account and then imported at the church. We strongly encourage you to use WebTools so that attendance batches can be created online and imported into Shepherd's Staff® without the need of a flash drive.

Note

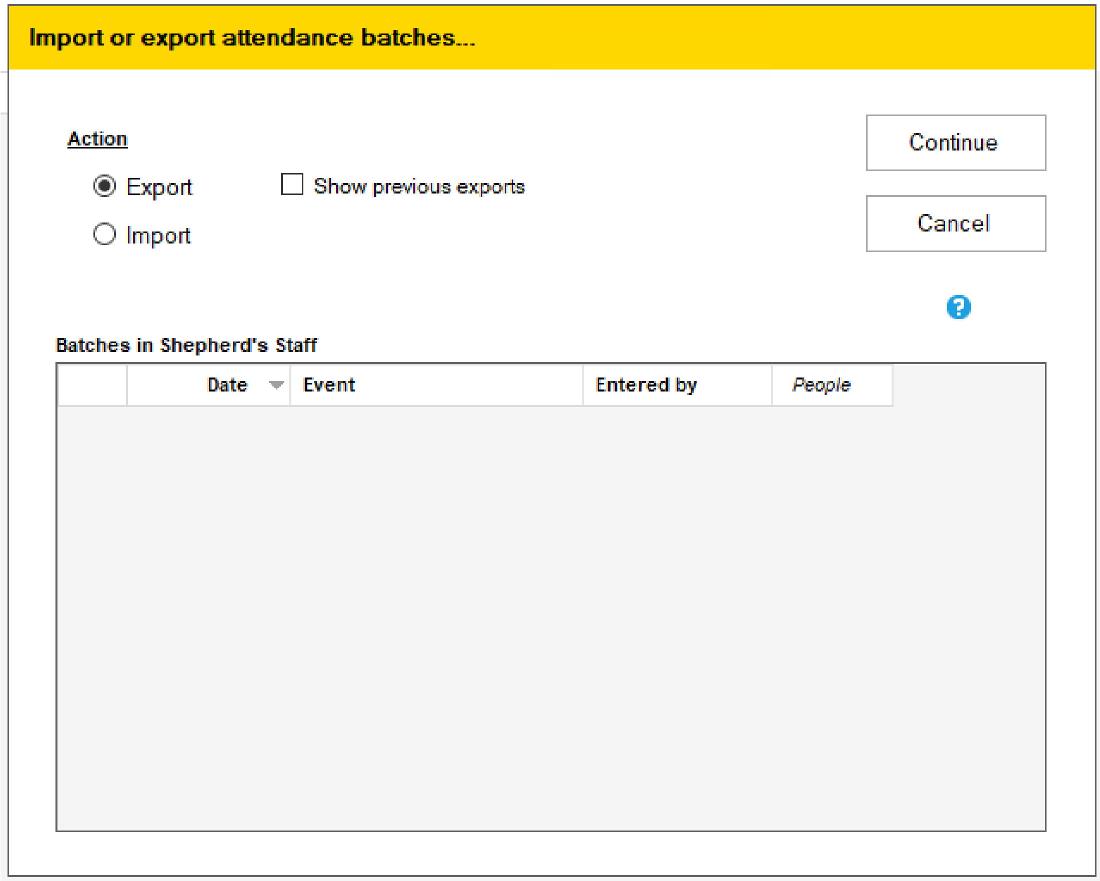
Batches must be unposted to be exported and must have at least one person already in the batch. Export and import files from 2018 and older versions of Shepherd's Staff are not compatible with the newer version.

How to Export a Batch:

1. Open the **Attendance** module and select the **Batches section**.
2. Select the **File** icon in the command line.
3. A new window will appear. By default, **Export** will be marked under **Actions**.
4. Select the **Batch** you would like to export and click **Continue**.
5. A window will open where you can select a location for exporting the file.

How to Import a Batch:

1. Open the **Attendance** module and select the **Batches section**.
2. Select the **File** icon in the command line.
3. A new window will appear. Select **Import** under **Actions**.
4. A window will appear where you can navigate and select the export batch file.
5. A summary of all batches saved in the location selected will appear at the bottom of the **Import and Export window**. Select the **Batches** that you wish to import.
6. Click **Continue** to import the batches.


Import or export attendance batches...
Action
Export
Show previous exports
Import
Continue
Cancel
Batches in Shepherd's Staff
Date
Event
Entered by
People

Detail

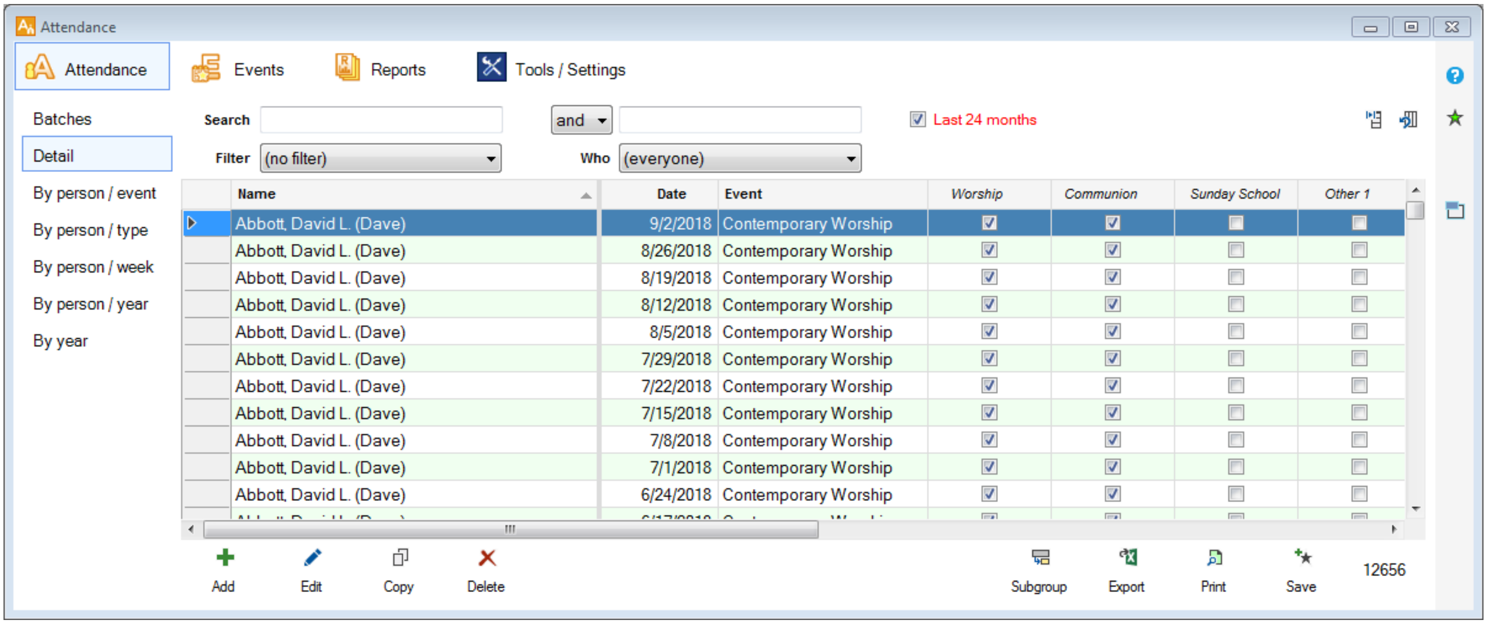
Overview

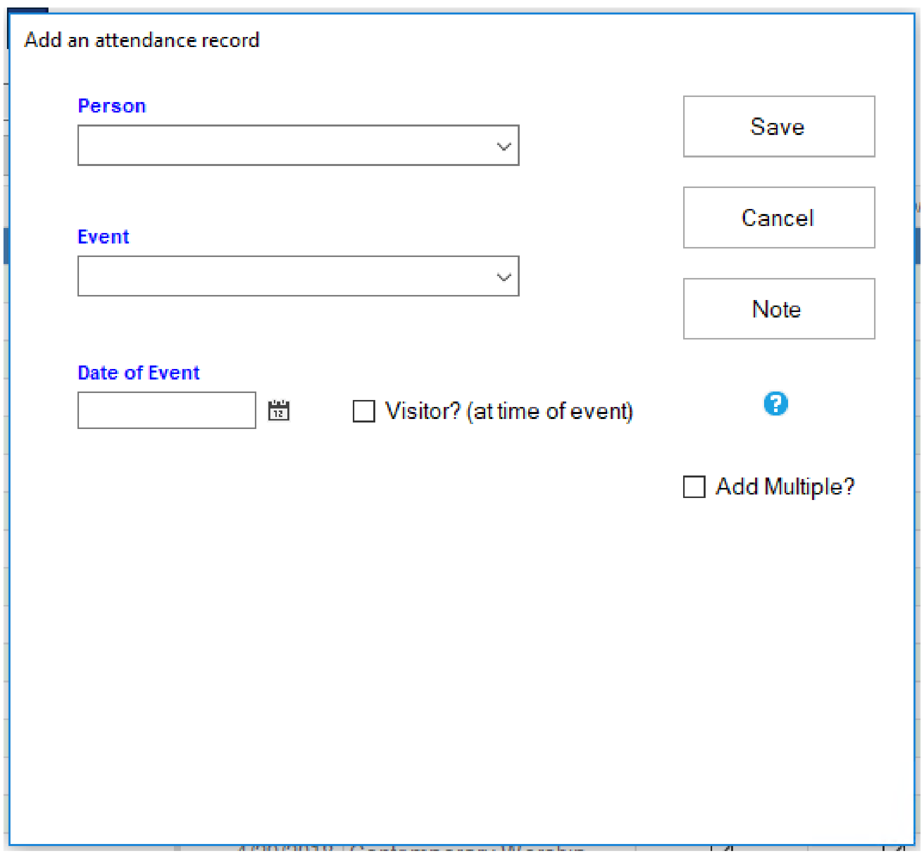
The Attendance Detail view displays all the attendance records for each member. These records display the date and the event that the person attended. This list can be quite extensive with churches with many members or with a variety of events where attendance is recorded. Because of this, filter and search bars are available at the top of the page to quickly search for people attending a specific event at a specific date and can save and print the view as a report.

Attendance records are created automatically once an attendance batch has been posted. You also can enter attendance by adding an attendance record from this view. This is helpful for when you missed a small number of individuals when creating a batch or added the incorrect people. In addition, you can edit, copy, and delete records and even make the view a static subgroup.

Here is how to add an attendance record:

1. Open the **Attendance** module and select the **Detail section**.
2. Click **Add** in the command line.
3. A new window will appear. Select a **Person**, **Event**, and **Date**. If the event has multiple types, options will appear on the lower half of the window.
4. Add a **Note** if needed.
5. If the person was a **visitor at the time** of the event, select the **Visitor?** You also can select the **Add Multiple?** checkbox if you are adding more than one person. The window will reappear after saving. Since Shepherd's Staff assumes you are adding multiple people to the same event, the event and date will remain the same.
6. Click **Save** when you are finished.


Attendance
Attendance
Events
Reports
Tools / Settings
Batches
Detail
By person / event
By person / type
By person / week
By person / year
By year
Search
and
Last 24 months
Filter
(no filter)
Who
(everyone)
Name
Date
Event
Worship
Communion
Sunday School
Other 1
Abbott, David L. (Dave) 9/2/2018 Contemporary Worship
Abbott, David L. (Dave) 8/26/2018 Contemporary Worship
Abbott, David L. (Dave) 8/19/2018 Contemporary Worship
Abbott, David L. (Dave) 8/12/2018 Contemporary Worship
Abbott, David L. (Dave) 8/5/2018 Contemporary Worship
Abbott, David L. (Dave) 7/29/2018 Contemporary Worship
Abbott, David L. (Dave) 7/22/2018 Contemporary Worship
Abbott, David L. (Dave) 7/15/2018 Contemporary Worship
Abbott, David L. (Dave) 7/8/2018 Contemporary Worship
Abbott, David L. (Dave) 7/1/2018 Contemporary Worship
Abbott, David L. (Dave) 6/24/2018 Contemporary Worship
Add
Edit
Copy
Delete
Subgroup
Export
Print
Save
12656


Add an attendance record
Person
Event
Date of Event
Visitor? (at time of event)
Save
Cancel
Note
Add Multiple?

By Person/Event

Overview

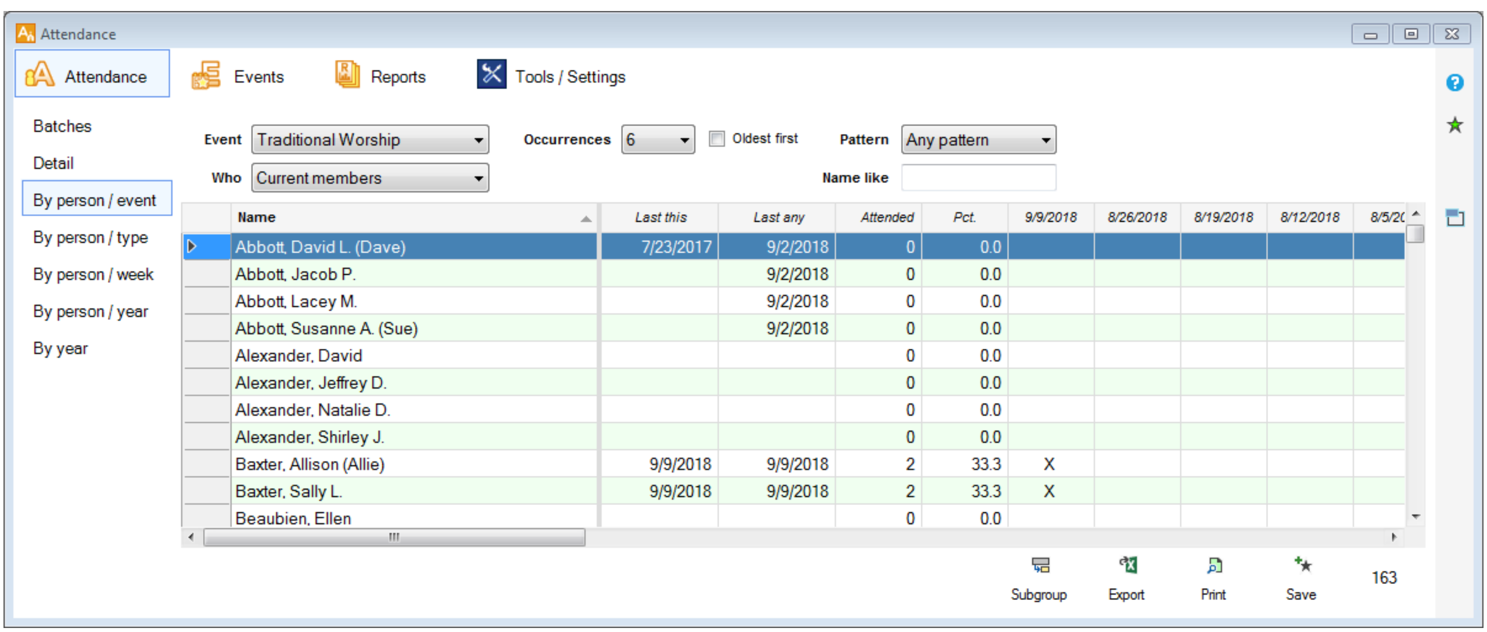
This view displays the attendance habits of a person and breaks down the information by event. It lists when the person last attended (either the selected event or any event), the number of events attended, and other information. The view has a variety of searches and filters to narrow down the list of people. Finally, like other views, it can be saved, created into a static subgroup, and printed.

Note

This view is for reference only and data cannot be changed. If you find a discrepancy, you will have to make the changes in the detail section and edit the attendance record.

Here is how to use the By Person/Event view:

1. Open the **Attendance** module and select the **By Person/Event**
2. Use the **Event** and **Who** drop-downs to narrow your search.
3. Use the **Occurrences** drop-down to determine the number of events.
4. Use the **Pattern** drop-down to filter out various Worship Patterns, such as the attendance percentage or an increase or decrease in attendance.



By Person/Type

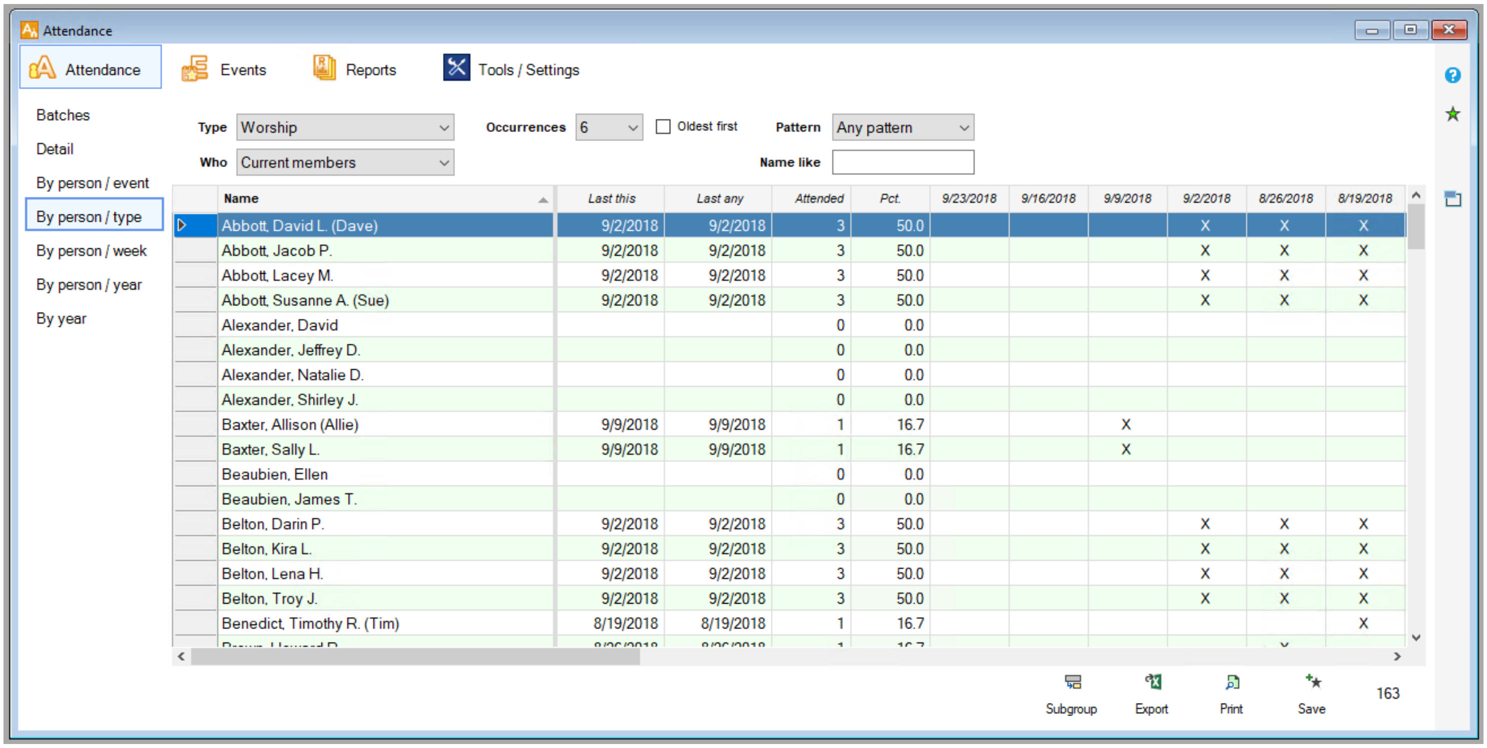
Overview

This section is the same as the By Person/Event section, except the data is broken down by event type instead of specific events. The section lists when a person last attended (either the selected event or any event), the number of events attended, and other information. The view has a variety of searches and filters to narrow down the list of people. Finally, like other views, it can be saved, created into a static subgroup, and printed.

> **Note**
>
> This view is for reference only and data cannot be changed. If you find a discrepancy, you will have to make the changes in the detail section and edit the attendance record.

Here is how to use the By Person/Event view:

1. Open the **Attendance** module and select the **By Person/type**
2. Use the **Event** and **Who** drop-downs to narrow your search.
3. Use the **Occurrences** drop-down to determine the number of events.
4. Use the **Pattern** drop-down to filter out various Worship Patterns, such as the attendance percentage or an increase or decrease in attendance.



Name	Last this	Last any	Attended	Pct.	9/23/2018	9/16/2018	9/9/2018	9/2/2018	8/26/2018	8/19/2018
Abbott, David L. (Dave)	9/2/2018	9/2/2018	3	50.0				X	X	X
Abbott, Jacob P.	9/2/2018	9/2/2018	3	50.0				X	X	X
Abbott, Lacey M.	9/2/2018	9/2/2018	3	50.0				X	X	X
Abbott, Susanne A. (Sue)	9/2/2018	9/2/2018	3	50.0				X	X	X
Alexander, David			0	0.0						
Alexander, Jeffrey D.			0	0.0						
Alexander, Natalie D.			0	0.0						
Alexander, Shirley J.			0	0.0						
Baxter, Allison (Allie)	9/9/2018	9/9/2018	1	16.7			X			
Baxter, Sally L.	9/9/2018	9/9/2018	1	16.7			X			
Beaubien, Ellen			0	0.0						
Beaubien, James T.			0	0.0						
Belton, Darin P.	9/2/2018	9/2/2018	3	50.0				X	X	X
Belton, Kira L.	9/2/2018	9/2/2018	3	50.0				X	X	X
Belton, Lena H.	9/2/2018	9/2/2018	3	50.0				X	X	X
Belton, Troy J.	9/2/2018	9/2/2018	3	50.0				X	X	X
Benedict, Timothy R. (Tim)	8/19/2018	8/19/2018	1	16.7						X

By Person/Week

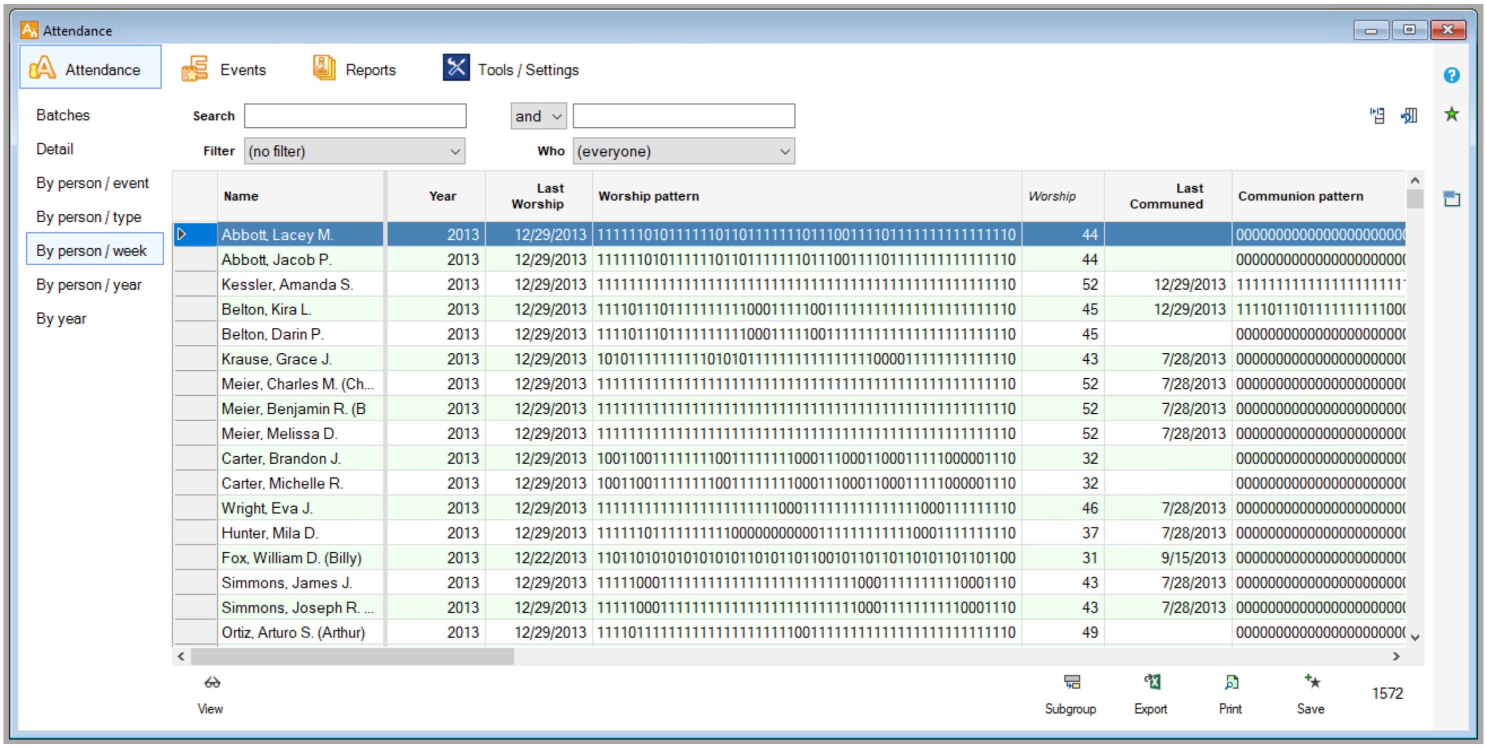
Overview

This view breaks down each person's data on a weekly basis. Each person is listed by year, and those years are broken down by week. The grid contains data such as the total number of each event type, the last time the person attended each event type, and the worship pattern. The view has a variety of searches and filters to narrow down the list of people. Finally, like other views, it can be saved, created into a static subgroup, and printed. In the command line, you will find a **View** button that will bring up the attendance summary for the selected person.

> **Note**
>
> This view is for reference only and data cannot be changed. If you find a discrepancy, you will have to make the changes in the detail section and edit the attendance record.

Here is how to use the By Person/Week view:

1. Open the **Attendance** module and select the **By Person/Week section**.
2. Use the **Filter** and **Who** drop-downs to narrow your search.
3. Use the **Search** to narrow down people, dates, and even the worship pattern.
4. Select **View** to preview the attendance summary.



Attendance
Attendance
Events
Reports
Tools / Settings
Batches
Detail
By person / event
By person / type
By person / week
By person / year
By year
Search
and
Filter (no filter)
Who (everyone)
Name | Year | Last Worship | Worship pattern | Worship | Last Communed | Communion pattern
Abbott, Lacey M. | 2013 | 12/29/2013 | 1111110101111110110111111101110011110111111111111110 | 44 | | 000000000000000000000
Abbott, Jacob P. | 2013 | 12/29/2013 | 1111110101111110110111111101110011110111111111111110 | 44 | | 000000000000000000000
Kessler, Amanda S. | 2013 | 12/29/2013 | 1111111111111111111111111111111111111111111111111110 | 52 | 12/29/2013 | 111111111111111111111
Belton, Kira L. | 2013 | 12/29/2013 | 1111011101111111111000111110011111111111111111111110 | 45 | 12/29/2013 | 111101110111111111100
Belton, Darin P. | 2013 | 12/29/2013 | 1111011101111111111000111110011111111111111111111110 | 45 | | 000000000000000000000
Krause, Grace J. | 2013 | 12/29/2013 | 1010111111111101010111111111111111100001111111111110 | 43 | 7/28/2013 | 000000000000000000000
Meier, Charles M. (Ch... | 2013 | 12/29/2013 | 1111111111111111111111111111111111111111111111111110 | 52 | 7/28/2013 | 000000000000000000000
Meier, Benjamin R. (B | 2013 | 12/29/2013 | 1111111111111111111111111111111111111111111111111110 | 52 | 7/28/2013 | 000000000000000000000
Meier, Melissa D. | 2013 | 12/29/2013 | 1111111111111111111111111111111111111111111111111110 | 52 | 7/28/2013 | 000000000000000000000
Carter, Brandon J. | 2013 | 12/29/2013 | 1001100111111110011111111000111000110001111000001110 | 32 | | 000000000000000000000
Carter, Michelle R. | 2013 | 12/29/2013 | 1001100111111110011111111000111000110001111000001110 | 32 | | 000000000000000000000
Wright, Eva J. | 2013 | 12/29/2013 | 1111111111111111111111110001111111111111110001111110 | 46 | 7/28/2013 | 000000000000000000000
Hunter, Mila D. | 2013 | 12/29/2013 | 1111110111111111110000000000011111111111110001111110 | 37 | 7/28/2013 | 000000000000000000000
Fox, William D. (Billy) | 2013 | 12/22/2013 | 1101101010101010110101101100101101101101011011011100 | 31 | 9/15/2013 | 000000000000000000000
Simmons, James J. | 2013 | 12/29/2013 | 1111100011111111111111111111111110001111111110001110 | 43 | 7/28/2013 | 000000000000000000000
Simmons, Joseph R. ... | 2013 | 12/29/2013 | 1111100011111111111111111111111110001111111110001110 | 43 | 7/28/2013 | 000000000000000000000
Ortiz, Arturo S. (Arthur) | 2013 | 12/29/2013 | 1111011111111111111111111110011111111111111111111110 | 49 | | 000000000000000000000
View
Subgroup
Export
Print
Save
1572

By Person/Year

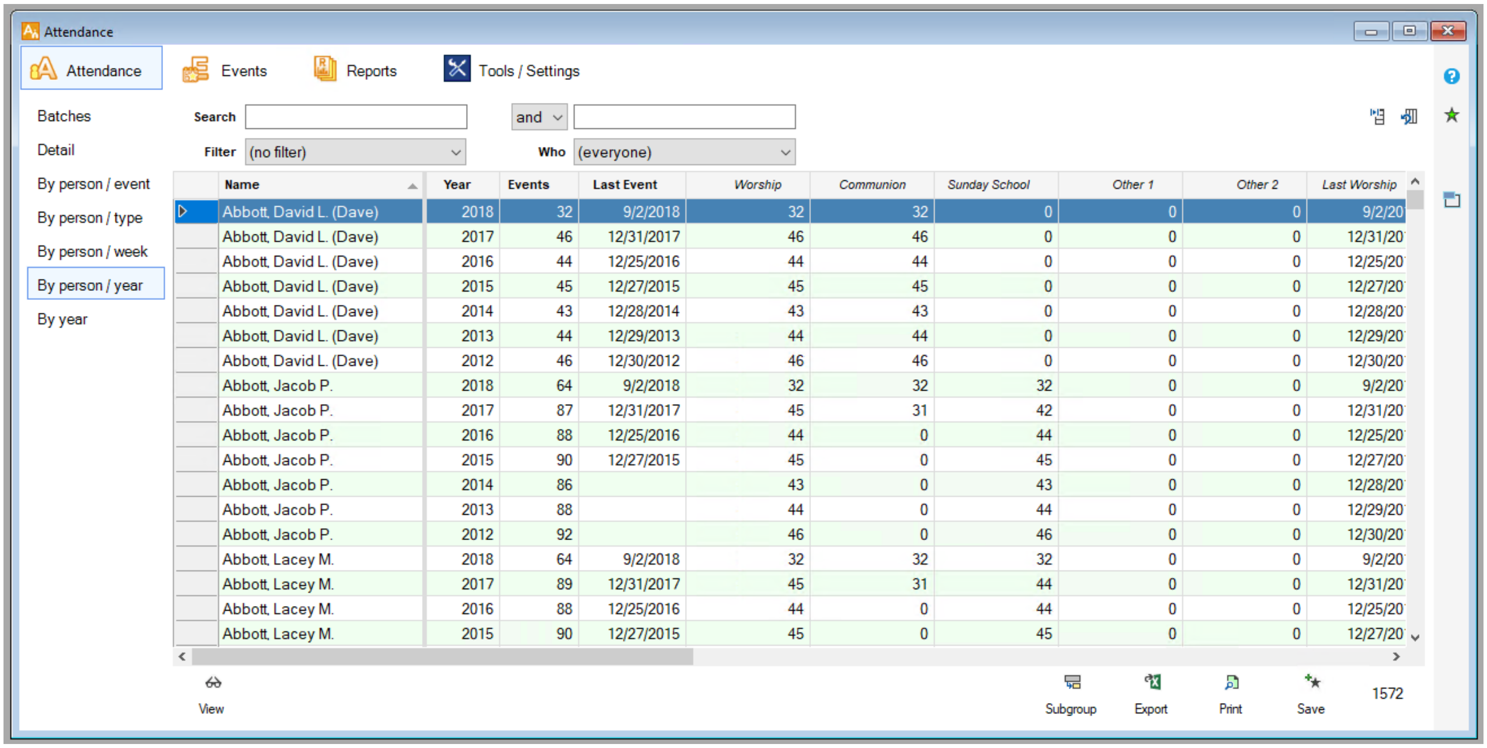
Overview

The **By Person/Year** tab contains a summary of each person's attendance by year. In this view, you will find information such as the total number of events each person attended, the event type that was attended, and membership data such as the ministry group, participation, and person assigned. The view has a variety of searches and filters to narrow down the list of people. Finally, like other views, it can be saved, created into a static subgroup, and printed. In the command line, you will find a **View** button that will bring up the attendance summary for the selected person.

> **Note**
>
> This view is for reference only and data cannot be changed. If you find a discrepancy, you will have to make the changes in the detail section and edit the attendance record.

Here is how to use the By Person/Year view:

1. Open the **Attendance** module and select the **By Person/Year**
2. Use the **Filter** and **Who** drop-downs to narrow your search.
3. Use the **Search** to narrow down people, dates, and even the worship pattern.
4. Select **View** to preview the attendance summary.


Attendance
Attendance
Events
Reports
Tools / Settings
Batches
Detail
By person / event
By person / type
By person / week
By person / year
By year
Search
and
Filter
(no filter)
Who
(everyone)

Name	Year	Events	Last Event	Worship	Communion	Sunday School	Other 1	Other 2	Last Worship
Abbott, David L. (Dave)	2018	32	9/2/2018	32	32	0	0	0	9/2/20
Abbott, David L. (Dave)	2017	46	12/31/2017	46	46	0	0	0	12/31/20
Abbott, David L. (Dave)	2016	44	12/25/2016	44	44	0	0	0	12/25/20
Abbott, David L. (Dave)	2015	45	12/27/2015	45	45	0	0	0	12/27/20
Abbott, David L. (Dave)	2014	43	12/28/2014	43	43	0	0	0	12/28/20
Abbott, David L. (Dave)	2013	44	12/29/2013	44	44	0	0	0	12/29/20
Abbott, David L. (Dave)	2012	46	12/30/2012	46	46	0	0	0	12/30/20
Abbott, Jacob P.	2018	64	9/2/2018	32	32	32	0	0	9/2/20
Abbott, Jacob P.	2017	87	12/31/2017	45	31	42	0	0	12/31/20
Abbott, Jacob P.	2016	88	12/25/2016	44	0	44	0	0	12/25/20
Abbott, Jacob P.	2015	90	12/27/2015	45	0	45	0	0	12/27/20
Abbott, Jacob P.	2014	86		43	0	43	0	0	12/28/20
Abbott, Jacob P.	2013	88		44	0	44	0	0	12/29/20
Abbott, Jacob P.	2012	92		46	0	46	0	0	12/30/20
Abbott, Lacey M.	2018	64	9/2/2018	32	32	32	0	0	9/2/20
Abbott, Lacey M.	2017	89	12/31/2017	45	31	44	0	0	12/31/20
Abbott, Lacey M.	2016	88	12/25/2016	44	0	44	0	0	12/25/20
Abbott, Lacey M.	2015	90	12/27/2015	45	0	45	0	0	12/27/20

View
Subgroup
Export
Print
Save
1572

By Year

Overview

Most churches will have historical attendance data they would like to add into Shepherd's Staff® without having to enter each event as a batch. The Year Summary view allows you to enter an entire years' worth of attendance data at once by entering the total for the event types. When you edit a summary, you can also view the attendance averages and medians for each type of event. Notes about each year's attendance can also be added.

Use the buttons at the bottom of the table to add, edit, copy, and delete a year summary. In addition, you can double click a row to edit that specific summary.

> **Note**
>
> Year summaries are automatically created once a batch for that year is posted. Year summaries cannot be deleted unless the event summaries for that year are deleted. (You can do this by navigating to the **Events** tab, then to the **By date** table.)

Here is how to add or edit a year summary:

1. Under the **Attendance** tab, select the **By year**
2. Double click the row to edit the summary, or click **Add** at the bottom of the table to add a summary.
3. Enter the data into the **Year**, **Event Occurrences**, **Non-visitors**, and **Visitors**
4. Add a note if needed.
5. Click **Save** once finished.

Edit a year summary

Year

2017

	Event Occurrences	Non-visitors	Visitors	Attendance Totals	Avg. Total Attendance*	Average Non-visitors*	Average Visitors*
Worship	108	5667	388	6,055	56.1	52.5	3.6
Communion	108	4979	269	5,248	48.6	46.1	2.5
Sunday School	54	1318	0	1,318	24.4	24.4	0
Other 1	0	0	0	0	0	0	0
Other 2	0	0	0	0	0	0	0

Save

Cancel

Note

Average

Median

Attendance Summary

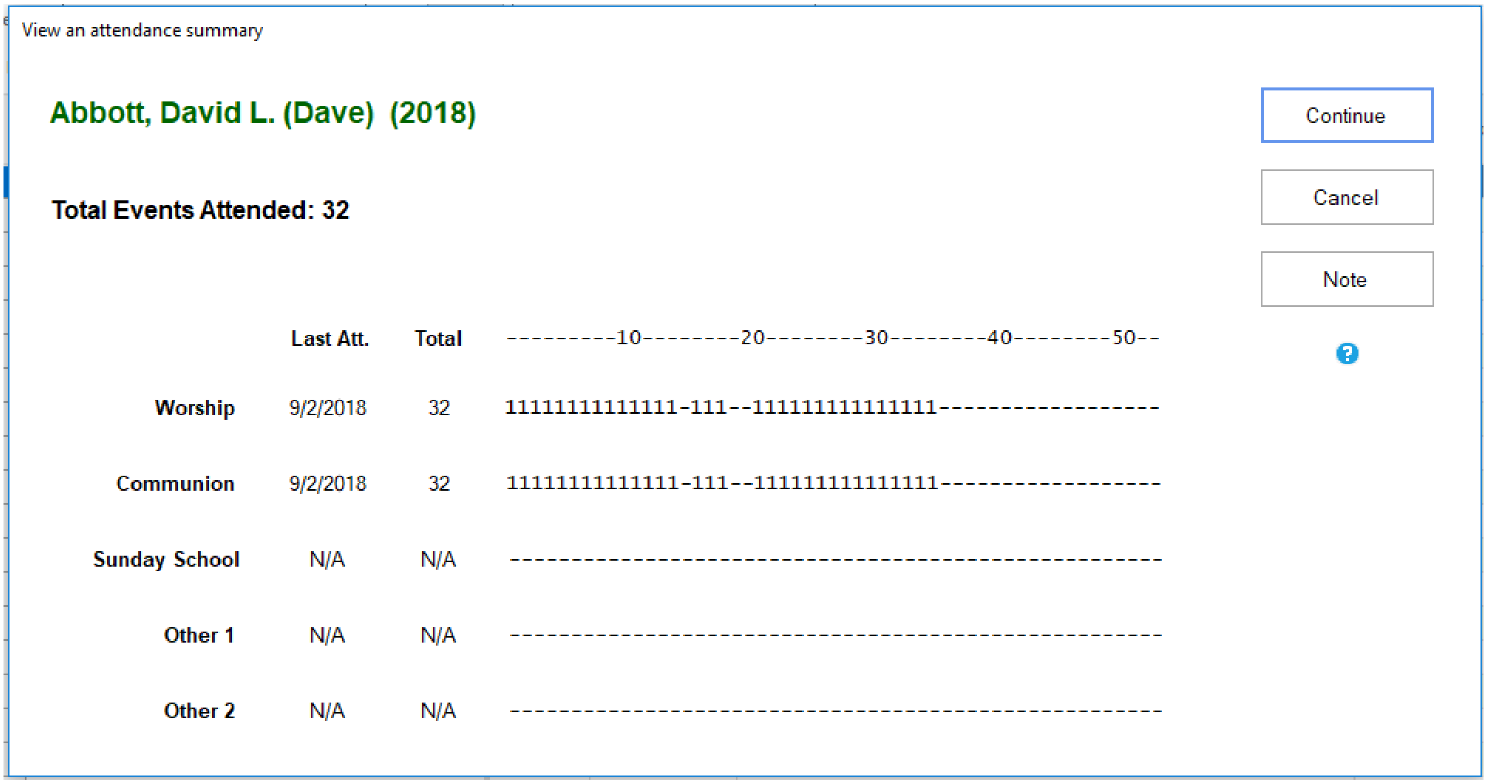
Overview

The Attendance Summary view displays each person's attendance statistics over the course of a year. This can be viewed by clicking the **View** button in the lower left corner of the **By person/week** or the **By person/year** categories of the Attendance tab. The view displays all the different event types with columns listing the last event the person attended in the year, the total number of events they attended, and their worship pattern. In addition, you can make a note for the person for the given year.

> **Note**
>
> This view is for reference only and data cannot be changed. If you find a discrepancy, you will have to make the changes in the detail section and edit the attendance record.

Here is how to view the attendance summary:

1. Click the **Attendance** tab and then the **By person/week** or **By person/year**
2. Select or search for the person you wish to view.
3. Click **View** in the bottom left corner under the table. A window will appear displaying the statistics for the selected person.


View an attendance summary
Abbott, David L. (Dave) (2018)
Continue
Cancel
Note
Total Events Attended: 32
Last Att.
Total
---------10--------20--------30--------40--------50--
Worship
9/2/2018
32
11111111111111-111--111111111111111------------------
Communion
9/2/2018
32
11111111111111-111--111111111111111------------------
Sunday School
N/A
N/A

Other 1
N/A
N/A

Other 2
N/A
N/A

Year Summary

Overview

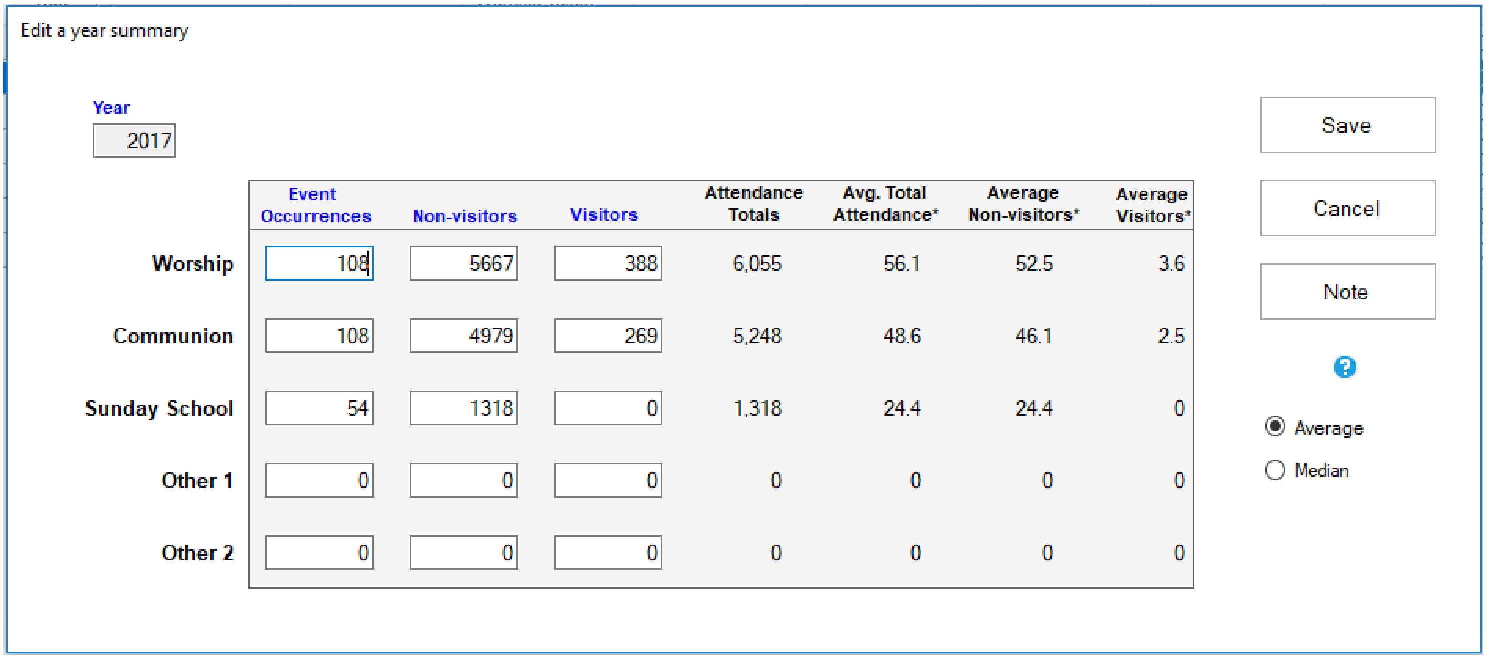
Most churches will have historical attendance data they would like to add into Shepherd's Staff® without having to enter each event as a batch. The Year Summary view allows you to enter an entire years' worth of attendance data at once by entering the total for the event types. When you edit a summary, you can also view the attendance averages and medians for each type of event. Notes about each year's attendance can also be added.

Use the buttons at the bottom of the table to add, edit, copy, and delete a year summary. In addition, you can double click a row to edit that specific summary.

> **Note**
>
> Year summaries are automatically created once a batch for that year is posted. Year summaries cannot be deleted unless the event summaries for that year are deleted. (You can do this by navigating to the **Events** tab, then to the **By date** table.)

Here is how to add or edit a year summary:

1. Under the **Attendance** tab, select the **By year**
2. Double click the row to edit the summary, or click **Add** at the bottom of the table to add a summary.
3. Enter the data into the **Year**, **Event Occurrences**, **Non-visitors**, and **Visitors**
4. Add a note if needed.
5. Click **Save** once finished.


Edit a year summary
Year
2017
Event Occurrences
Non-visitors
Visitors
Attendance Totals
Avg. Total Attendance*
Average Non-visitors*
Average Visitors*
Worship 108 5667 388 6,055 56.1 52.5 3.6
Communion 108 4979 269 5,248 48.6 46.1 2.5
Sunday School 54 1318 0 1,318 24.4 24.4 0
Other 1 0 0 0 0 0 0 0
Other 2 0 0 0 0 0 0 0
Save
Cancel
Note
Average
Median

Worship Pattern

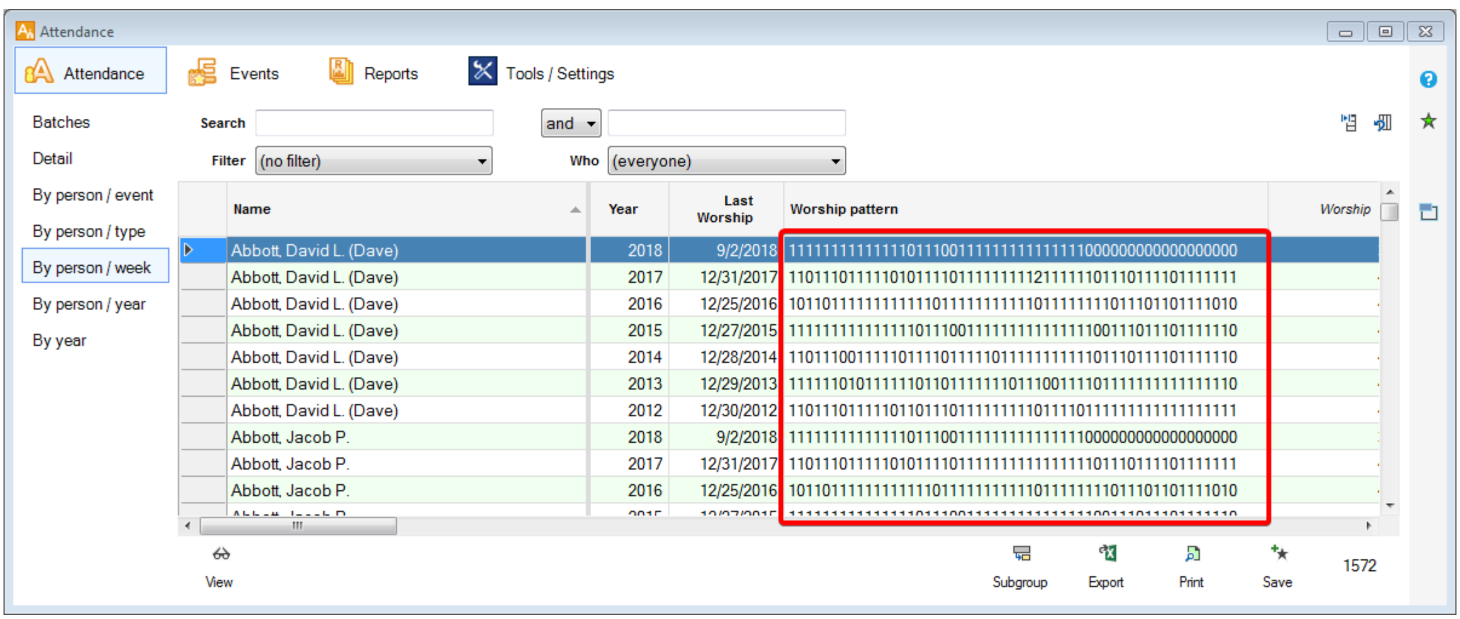
Overview

Worship patterns are a new concept in Shepherd's Staff that allow you to easily analyze people's worship habits. Most views under the **Attendance** tab contain either a drop-down filter for or a visual representation of the worship pattern. The drop-down filters list options for changing the view based on worship patterns that may not be displayed. These options include attending more or less than half the time, having an increase or decrease in attendance, and other criteria. The **By person/week** category is the only view that has a visual representation of the worship pattern.

The worship pattern is a series of numbers that contains fifty-three digits. Each digit represents the total number of events the person attended in a given week. Fifty-three weeks are displayed because in some years, there may be an extra week depending on what day the year starts. All drop-down filters are based on this series of numbers. Various formulas are then used to determine the results of the drop-down selection.

Note

Worship patterns in reports may replace "0" with "_".



Adding an Event Head Count

Overview

It is not uncommon for an event to occur for which the only form of attendance that is needed is a head count. Visitors also sometimes do not provide enough information to justify creating a household and person in the Membership module. Because of this, Shepherd's Staff® has several ways to add a head count to an event batch or event record.

Adding a visitor head count to an attendance batch

In this situation, you are making an attendance batch for an event and you only want to add the head count of unknown visitors. This can be done by simply creating a batch with the **Advanced Batch Entry** and clicking the **Visitors** button on the right side of the window. If you have a batch already created, select it from the **Attendance Batch** view and click **Edit**. Select **Advanced** and then click **Visitors**.

Adding a head count to a previously entered batch

When an attendance batch is posted, it creates an event record , which can be found in the **Events** tab under the **By Date** category. To access, **double-click the event record** and **edit** the non-visitor and visitor count.

Adding an event record with only a head count

For an event in which only a head count was taken and no specific people need to be listed as attended, you can create an event record without having to create an attendance batch. To do this, go to the **Events,** then **By Date** and click **Add**. This will bring up a new window, where you can select the Event, Date, and then enter the totals for visitors and non-visitors.

Events

- Events
- By Date
- By Year
- Enrollees

Events

Overview

Without event records, you cannot enter attendance. If you are using Shepherd's Staff for the first time, you will need to create at least one event record in order to enter attendance. An event record should be made for every event the church has that it wants to track attendance for. Usually this is for the various worship services and for Sunday School.

> **Note**
>
> It is suggested that you have an event record for each service and each Bible study or Sunday School class that you are tracking attendance for. This will allow you to better track data when generating reports. Information about Kiosks and Check-in will be covered in a separate article.

Each event record has a name, event type, description, enrollees, and special setting for a kiosk and check-in if your church uses them. Only an event name and type are required to create the event record. Enrollees are not required, but it is recommended you add them because it makes entering attendance easier.

Event Types

Event types are used when one event may have two different types of attendance being tracked. This is required for church services during which Communion participation is tracked. When attendance is entered, you have the option of marking each person as having participated in just the service or in both the service and Communion. Every event must have at least one event type selected.

> **Note**
>
> By default, Shepherd's Staff has event types called **Worship**, **Communion**, and **Sunday School**. You have the option of adding two additional, custom event types in the **Tools/Settings** tab under **Change attendance types**.

Key Terms

» Event—The name of the event that is being added or edited.

» Description—A brief summary of the event.

» Types—A categorization used to distinguish events. Multiple types can be selected for an event and attendance can be added for each event type.

» Is Active?—Only active events can have attendance added to them. Once attendance has been added to an event record, the event record cannot be deleted. It must be marked as inactive before it can be edited.

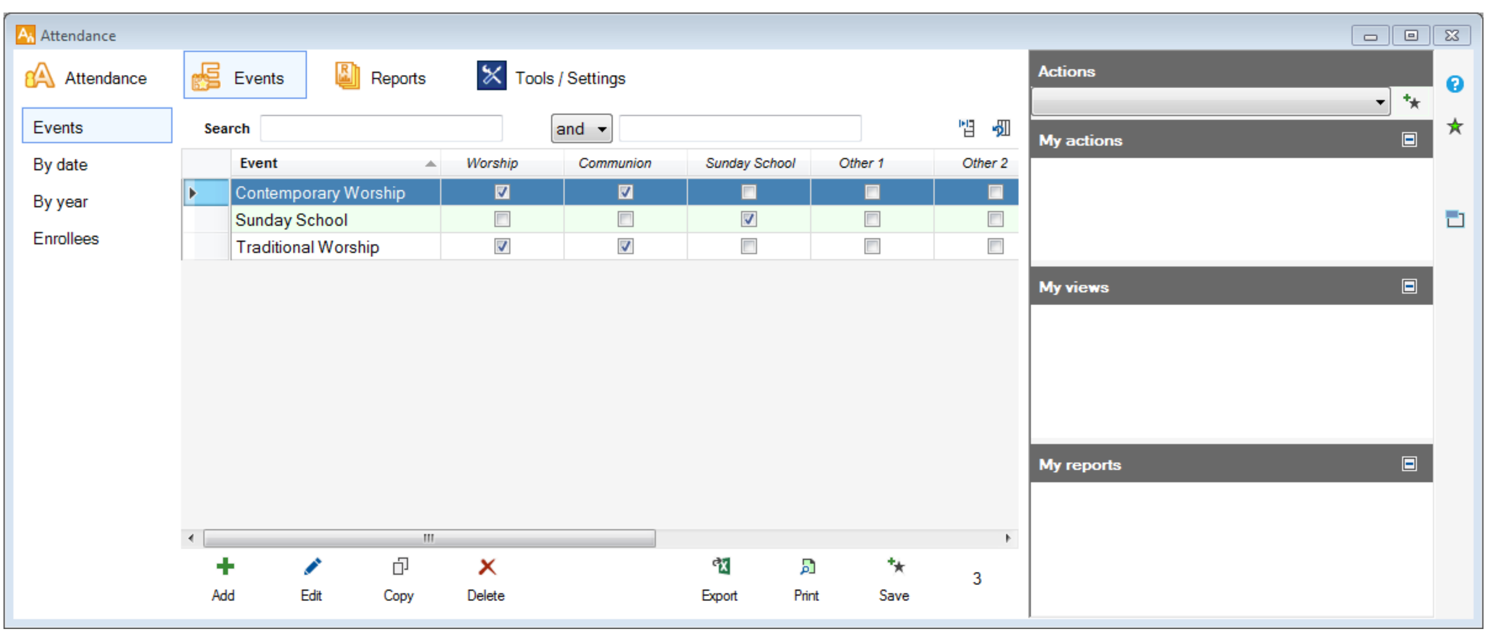
» Enrollees—People who attend an event on a regular basis. This can be used to quickly filter out people from any view in the Attendance module.

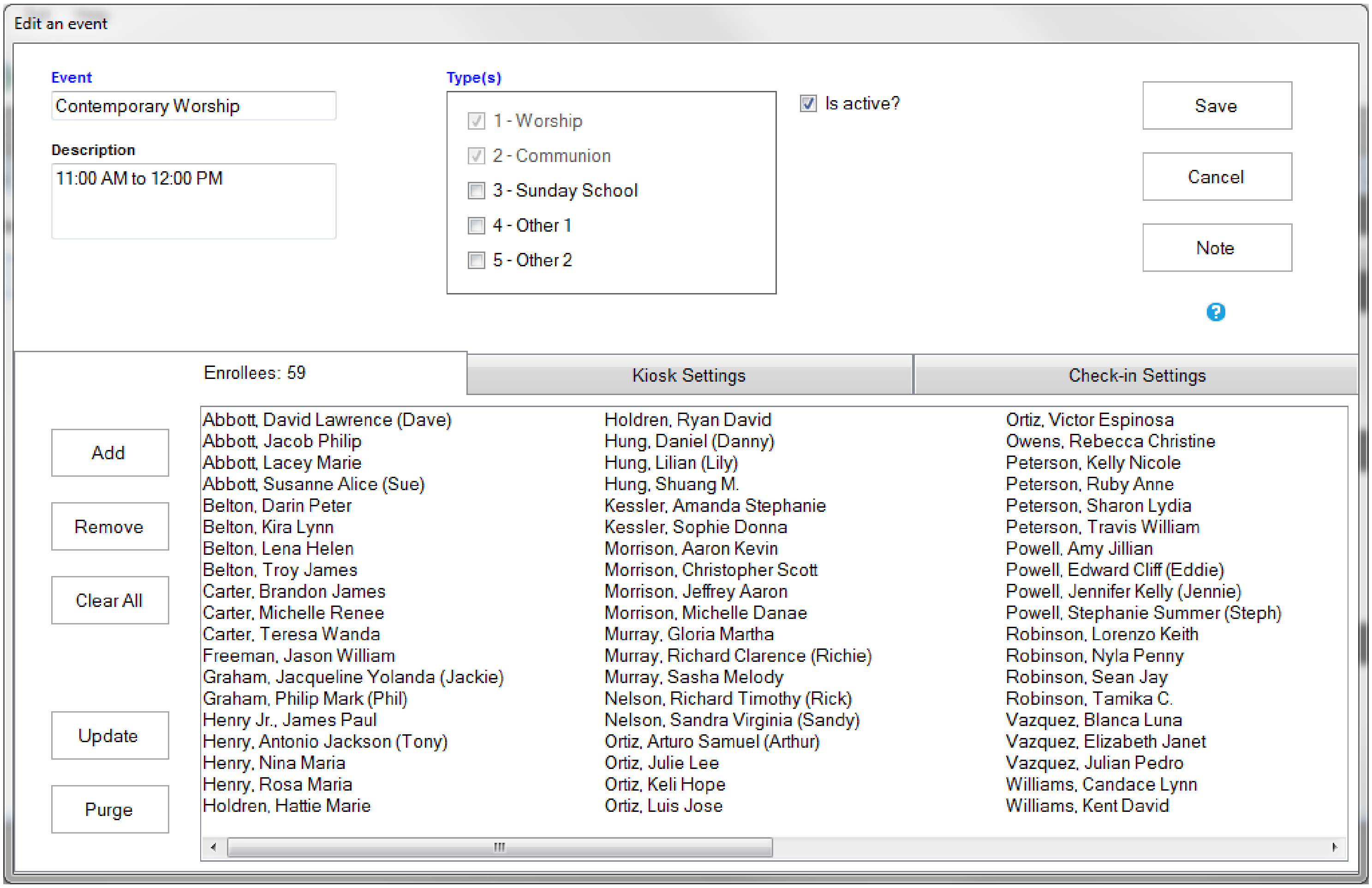
» Kiosk Setting—Setting used when a kiosk is in use at the church. Kiosks allow users to enter themselves as attending an event.

» Check-in Setting—Setting used when an event is set up to have people check in and to have name tags be printed for attendees. This is commonly used for Sunday School or childcare settings.

Here is how to add or edit an Event:

1. Open the Attendance module and select the **Events** tab, then select the **Events**
2. Click **Add** in the command line or double click an event from the list to edit it.
3. Add an **Event** name and select the appropriate **Type**.
4. Add any Enrollees.
5. Click **Save**.




Edit an event
Event
Contemporary Worship
Description
11:00 AM to 12:00 PM
Type(s)
1 - Worship
2 - Communion
3 - Sunday School
4 - Other 1
5 - Other 2
Is active?
Save
Cancel
Note
Enrollees: 59
Kiosk Settings
Check-in Settings
Add
Remove
Clear All
Update
Purge
Abbott, David Lawrence (Dave)
Abbott, Jacob Philip
Abbott, Lacey Marie
Abbott, Susanne Alice (Sue)
Belton, Darin Peter
Belton, Kira Lynn
Belton, Lena Helen
Belton, Troy James
Carter, Brandon James
Carter, Michelle Renee
Carter, Teresa Wanda
Freeman, Jason William
Graham, Jacqueline Yolanda (Jackie)
Graham, Philip Mark (Phil)
Henry Jr., James Paul
Henry, Antonio Jackson (Tony)
Henry, Nina Maria
Henry, Rosa Maria
Holdren, Hattie Marie
Holdren, Ryan David
Hung, Daniel (Danny)
Hung, Lilian (Lily)
Hung, Shuang M.
Kessler, Amanda Stephanie
Kessler, Sophie Donna
Morrison, Aaron Kevin
Morrison, Christopher Scott
Morrison, Jeffrey Aaron
Morrison, Michelle Danae
Murray, Gloria Martha
Murray, Richard Clarence (Richie)
Murray, Sasha Melody
Nelson, Richard Timothy (Rick)
Nelson, Sandra Virginia (Sandy)
Ortiz, Arturo Samuel (Arthur)
Ortiz, Julie Lee
Ortiz, Keli Hope
Ortiz, Luis Jose
Ortiz, Victor Espinosa
Owens, Rebecca Christine
Peterson, Kelly Nicole
Peterson, Ruby Anne
Peterson, Sharon Lydia
Peterson, Travis William
Powell, Amy Jillian
Powell, Edward Cliff (Eddie)
Powell, Jennifer Kelly (Jennie)
Powell, Stephanie Summer (Steph)
Robinson, Lorenzo Keith
Robinson, Nyla Penny
Robinson, Sean Jay
Robinson, Tamika C.
Vazquez, Blanca Luna
Vazquez, Elizabeth Janet
Vazquez, Julian Pedro
Williams, Candace Lynn
Williams, Kent David

By Date

Overview

The **By date** view lists all the event records by date and displays the attendance total for each event. If you want to enter just a head count for an event, this is the place to do it. This is an efficient method if taking specific attendance is not an option; however, this data will not be reflected on the profile for any specific person. You can also edit, copy, and delete records.

> **Note**
>
> Event records are automatically created once a batch is posted. An event record cannot be deleted unless all related attendance records in the Attendance **Detail** view are deleted first.

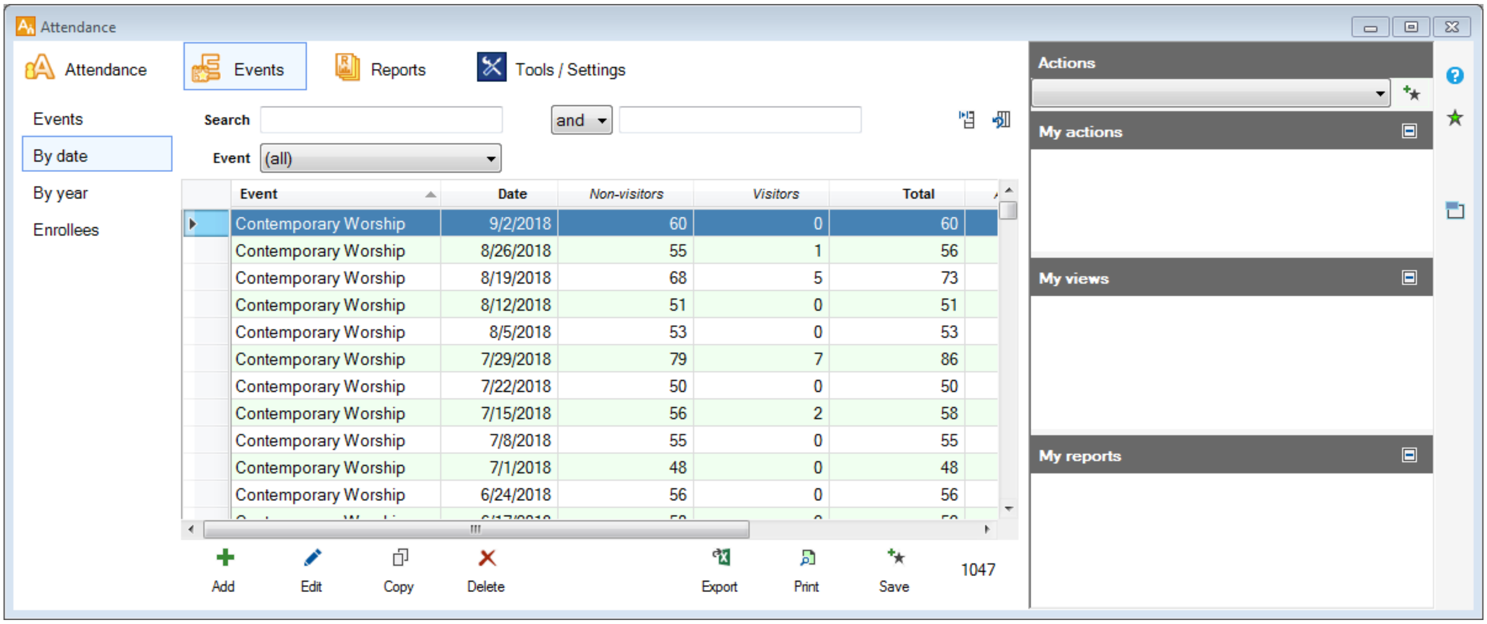
Key Terms

» Event—A drop-down used to select the type of event a record is for.

» Calculate using—Changes how the totals for the event are calculated, either by using the highest number or adding the event types together. For example, in a worship service, you would use the highest number, which would be the worship event type. This is because not everyone who attended may have taken Communion.

Here is how to add or edit an event summary:

1. Open the Attendance module and select the **Events** tab, then select the **By date**
2. Click **Add** in the command line, or double click a record to edit it.
3. Select an **event** from the drop-down and select a **date**.
4. Enter the **Non-visitor** and **Visitor** head counts.
5. Click **Save**.

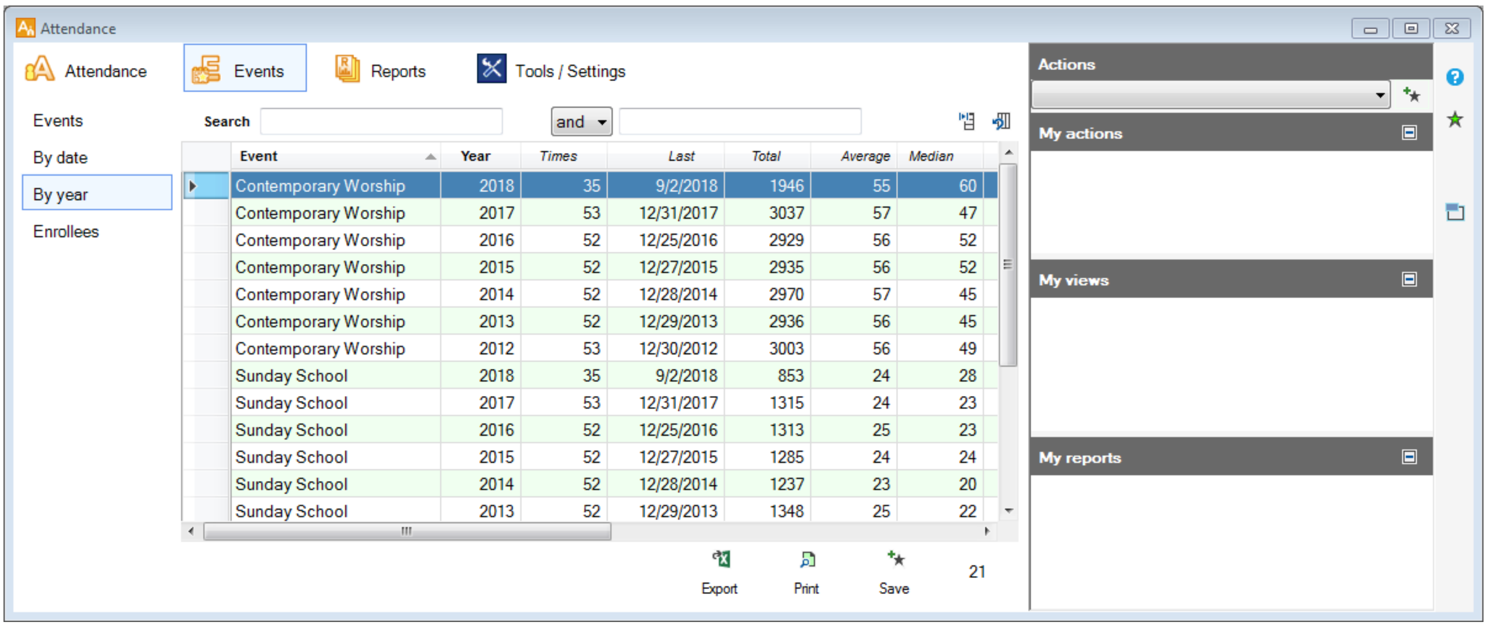

Attendance
Attendance
Events
Reports
Tools / Settings
Events
By date
By year
Enrollees
Search
and
Event
(all)
Event
Date
Non-visitors
Visitors
Total
Contemporary Worship 9/2/2018 60 0 60
Contemporary Worship 8/26/2018 55 1 56
Contemporary Worship 8/19/2018 68 5 73
Contemporary Worship 8/12/2018 51 0 51
Contemporary Worship 8/5/2018 53 0 53
Contemporary Worship 7/29/2018 79 7 86
Contemporary Worship 7/22/2018 50 0 50
Contemporary Worship 7/15/2018 56 2 58
Contemporary Worship 7/8/2018 55 0 55
Contemporary Worship 7/1/2018 48 0 48
Contemporary Worship 6/24/2018 56 0 56
Add
Edit
Copy
Delete
Export
Print
Save
1047
Actions
My actions
My views
My reports

By Year

Overview

The **By year** category is a reference-only view that displays the yearly data for each type of event. Statistics in this view are generated from the totals that are in the **By event** view. Any changes to the event records will reflect in this view. The statistics this view displays are the number of times the event occurred in a given year and the total and average attendance for both members and non-members in that year.

The view can be reached by opening the Attendance module, clicking on the **Events** tab, and clicking on the **By year** category.



Enrollees

Overview

Enrollees are people who attend an event the most often. While optional, it is recommended that you update and use a list of enrollees. In every view, enrollees can be selected from a filter drop-down and used to display data for those most likely to attend an event. The enrollee list can also be used to narrow down reports and subgroups.

The list of enrollees can be added to or updated at any time. When you first create an event, you will only have the option to add enrollees manually by clicking the **Add** button. If you edit the event, you will have the option to add enrollees manually or to automatically **Update** the list. **Update** will look through the attendance records for the past thirty days and will add anyone who has attended the event twice in that time frame. To remove enrollees, click the person's name and click **Remove** or use **Purge**. Purge will automatically remove people who have not attended the event in the past 120 days.

Key Terms

» Add—Adds people to the list of enrollees.

» Remove—Removes selected people from the list of enrollees.

» Clear All—Removes all people from the list of enrollees.

» Update—Adds people who have attended the event twice in the past thirty days.

» Purge—Removes people who have not attended the event in the past 120 days.

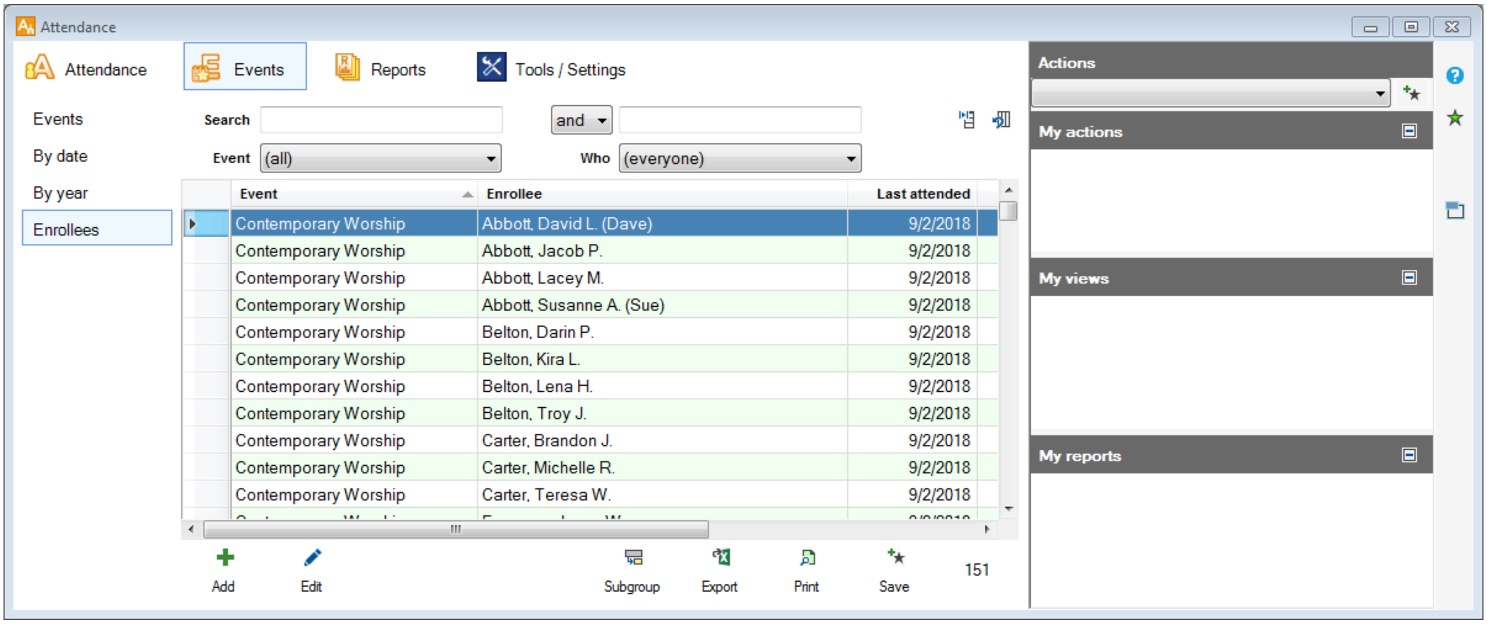
Here is how to use the Enrollees view:

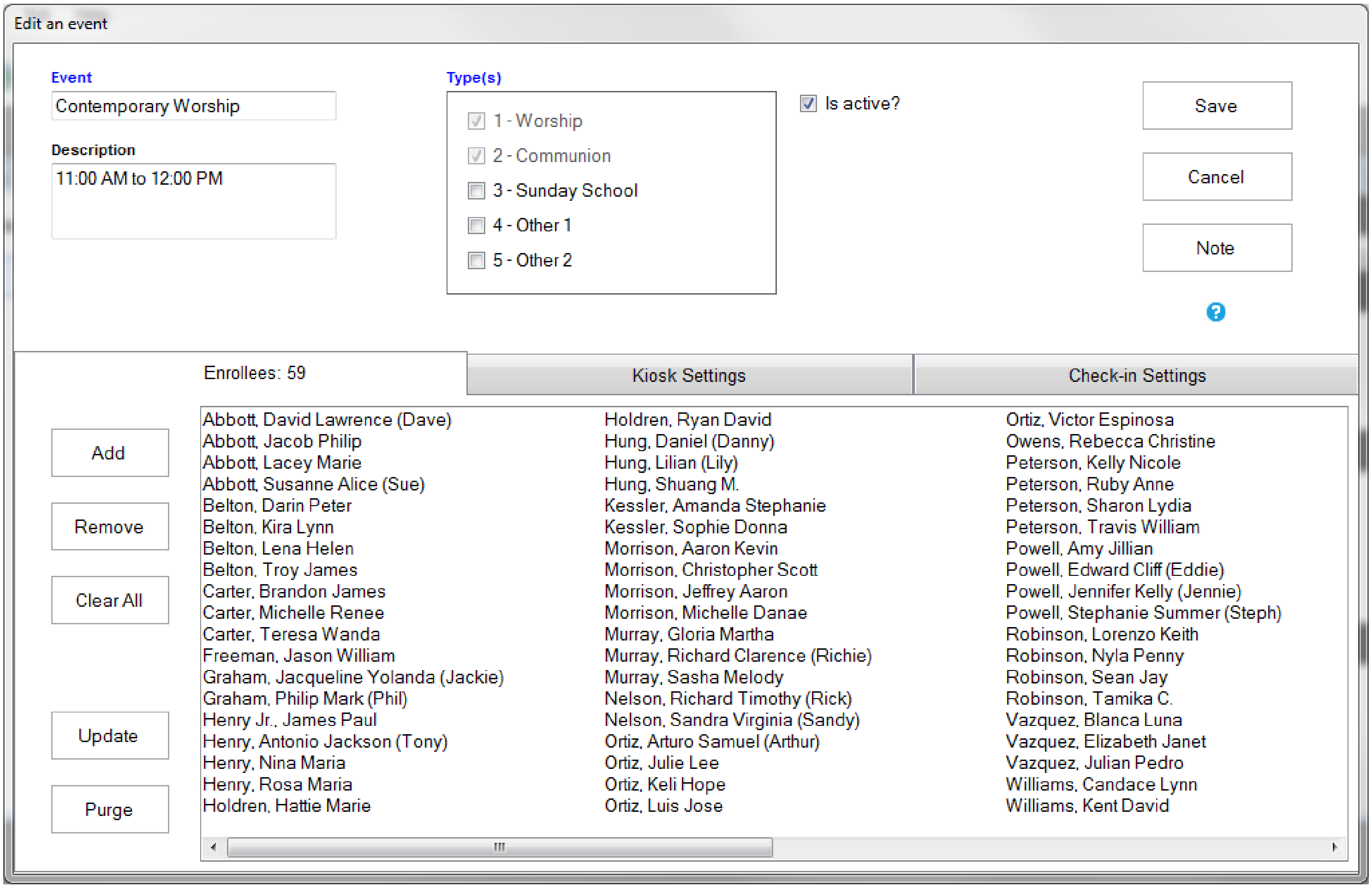
1. Open the Attendance module and select the **Events** tab, then select the **Enrollees**
2. Select a row for the event for which you want to add or remove enrollees.
3. Click **Edit** or **Add** in the command line or double click the event name.
4. Click **Add** or **Update**.
5. Clicking **Add** will bring up a view similar to the Advanced Batch Entry with two columns. Select the people from the list of possible attendees (left side) and click **Add** to add them to the list of selected enrollees (right side). Use the **Ctrl** key on your keyboard to select multiple people at once. When you are finished, click **Continue**.

6 Clicking **Update** will display a description of who will be added to the enrollee list. After confirming the list of enrollees, click **Continue**.

7 To clean up the list of attendees, select people from the list and click **Remove**. Alternatively, you can select **Purge** to automatically delete people.

8 When you are done making changes to the event, click **Save**.




Edit an event
Event
Contemporary Worship
Description
11:00 AM to 12:00 PM
Type(s)
1 - Worship
2 - Communion
3 - Sunday School
4 - Other 1
5 - Other 2
Is active?
Save
Cancel
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Kiosk Settings
Check-in Settings
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Clear All
Update
Purge
Abbott, David Lawrence (Dave)
Abbott, Jacob Philip
Abbott, Lacey Marie
Abbott, Susanne Alice (Sue)
Belton, Darin Peter
Belton, Kira Lynn
Belton, Lena Helen
Belton, Troy James
Carter, Brandon James
Carter, Michelle Renee
Carter, Teresa Wanda
Freeman, Jason William
Graham, Jacqueline Yolanda (Jackie)
Graham, Philip Mark (Phil)
Henry Jr., James Paul
Henry, Antonio Jackson (Tony)
Henry, Nina Maria
Henry, Rosa Maria
Holdren, Hattie Marie
Holdren, Ryan David
Hung, Daniel (Danny)
Hung, Lilian (Lily)
Hung, Shuang M.
Kessler, Amanda Stephanie
Kessler, Sophie Donna
Morrison, Aaron Kevin
Morrison, Christopher Scott
Morrison, Jeffrey Aaron
Morrison, Michelle Danae
Murray, Gloria Martha
Murray, Richard Clarence (Richie)
Murray, Sasha Melody
Nelson, Richard Timothy (Rick)
Nelson, Sandra Virginia (Sandy)
Ortiz, Arturo Samuel (Arthur)
Ortiz, Julie Lee
Ortiz, Keli Hope
Ortiz, Luis Jose
Ortiz, Victor Espinosa
Owens, Rebecca Christine
Peterson, Kelly Nicole
Peterson, Ruby Anne
Peterson, Sharon Lydia
Peterson, Travis William
Powell, Amy Jillian
Powell, Edward Cliff (Eddie)
Powell, Jennifer Kelly (Jennie)
Powell, Stephanie Summer (Steph)
Robinson, Lorenzo Keith
Robinson, Nyla Penny
Robinson, Sean Jay
Robinson, Tamika C.
Vazquez, Blanca Luna
Vazquez, Elizabeth Janet
Vazquez, Julian Pedro
Williams, Candace Lynn
Williams, Kent David

Reports

Reports Overview

Built-in Reports

In the past, Shepherd's Staff offered dozens of reports, but many simply pulled data from a view. Now, to simplify processes, the software contains a smaller number of reports that can be used to display data in different ways. Each report has options to narrow down the results by selecting subgroups, searching by various criteria, and setting a time frame.

Many reports have options to change formatting. In some cases, this changes not only how the data is presented but also what data is shown. In addition, fonts and scaling can be changed to make it easier to read the report. The report name can also be changed if you are using a saved report with a custom name; you can do this by checking the **Use as the report title** check box.

> **Note**
>
> Changing the font and scaling may result in data being cut off and not displaying correctly. If you are seeing data shown as #####, set the font and scaling to default. If you are still seeing #####, the value is too large for the field.

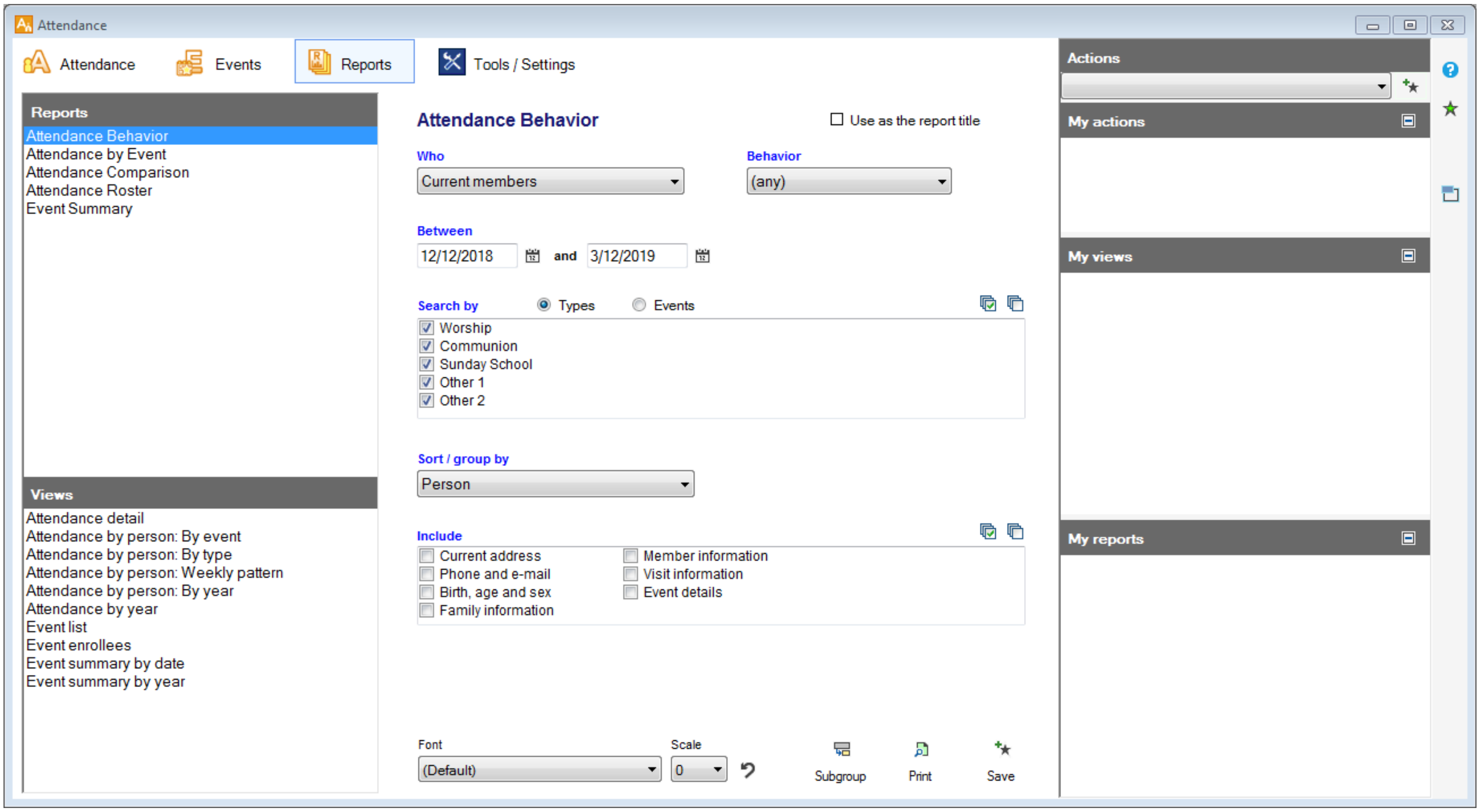
Saving Views as Reports

Every view can now be made into a report and saved for future use. You can do this by using the filters and searches, clicking **Print** in the command line, and choosing a **Group by** option. This gives you ultimate flexibility and freedom to create reports.

> **Note**
>
> Saving a view keeps all filters, searches, and sort orders. You may have to change some of these settings when printing a report. You can also create a dynamic subgroup that will update automatically.

Saving Reports

Because reports and views require some setting up, it is suggested you save the event you are creating a report from if you are going to use the report again in the future. You can do this by clicking **Save** in the command line. This adds the report to your favorites panel, where it can be given a unique name and used again in the future. If the report is saved from a view, it will appear under **My views**. The view will retain all searches, filters, and sort orders. If you save a report from the Reports tab, it will appear under **My reports** and will save all settings in the report.


Attendance
Attendance
Events
Reports
Tools / Settings
Reports
Attendance Behavior
Attendance by Event
Attendance Comparison
Attendance Roster
Event Summary
Views
Attendance detail
Attendance by person: By event
Attendance by person: By type
Attendance by person: Weekly pattern
Attendance by person: By year
Attendance by year
Event list
Event enrollees
Event summary by date
Event summary by year
Attendance Behavior
Use as the report title
Who
Current members
Behavior
(any)
Between
12/12/2018
and
3/12/2019
Search by
Types
Events
Worship
Communion
Sunday School
Other 1
Other 2
Sort / group by
Person
Include
Current address
Phone and e-mail
Birth, age and sex
Family information
Member information
Visit information
Event details
Font
(Default)
Scale
0
Subgroup
Print
Save
Actions
My actions
My views
My reports

Attendance Behavior

Overview

The Attendance Behavior report displays a variety of attendance information for people in your church. The report can be created for members, enrollees, and any subgroup. In addition, you can search for a specific event or event type. In addition to the total number of event attended in the date range,it will also displays the last attended event.

> **Note**
>
> This report replaces the Absentee, Attendance Follow Up, and Perfect/Missed Attendance reports in older versions of Shepherd's Staff®.

Key Parts

» Who—A list of various groups of people, including members, enrollees, and people from a subgroup or list.

» Behavior—A group of options for various attendance behaviors like perfect attendance and no attendance.

» Search by—Has two options that allow you to search by event type or by specific events.

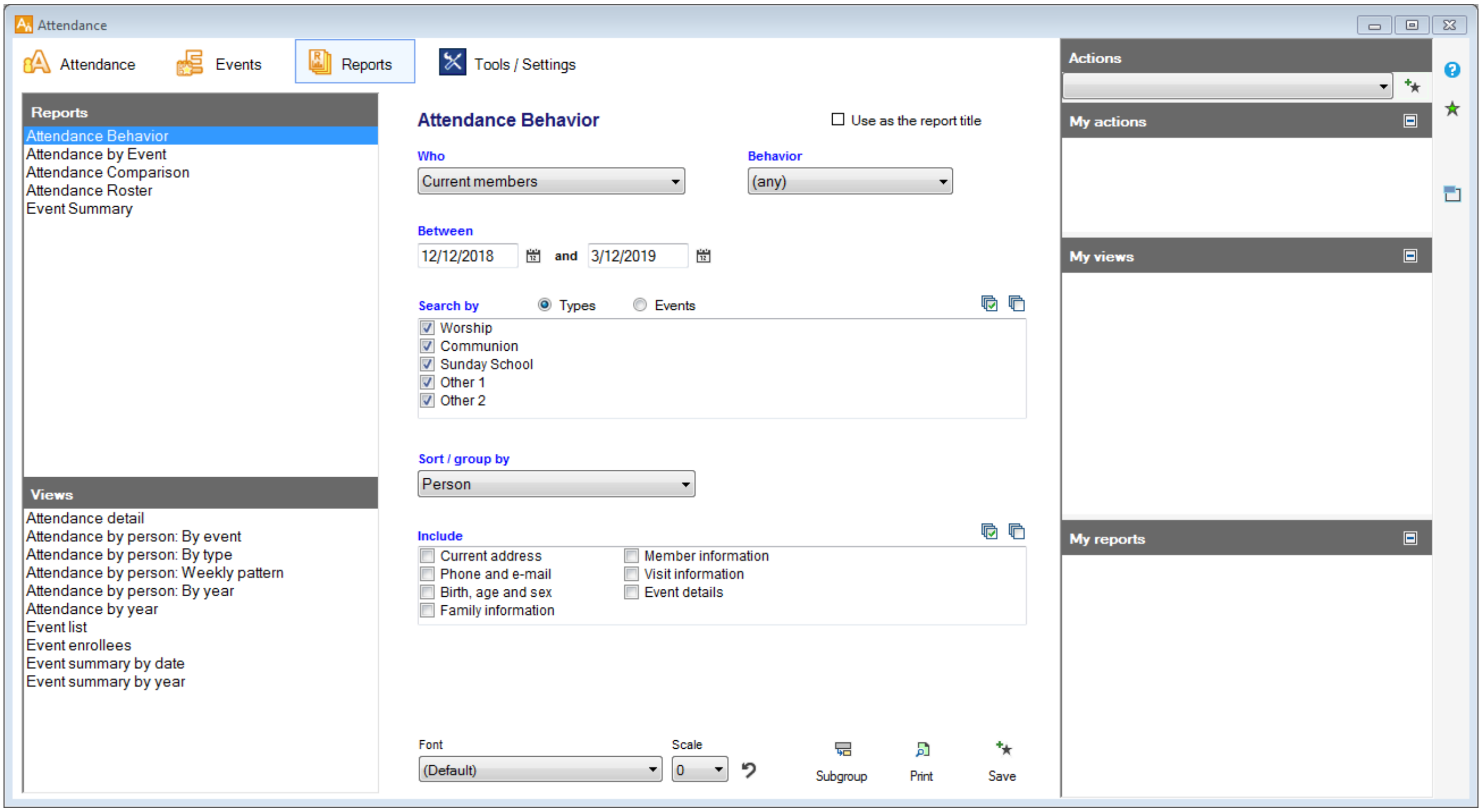
» Sort/group by—Allows you to select what you want the list of people to be sorted by.

» Include—Adds an assortment of information from each person's profile.

How to Generate an Attendance Behavior Report

1. Open the Attendance module and select the **Reports tab,** then select **Attendance Behavior** from the list of reports.
2. Select an option from the **Who** drop-down.
3. Select a specific **Behavior**. By default, **Any** is selected.
4. Pick a date range.
5. Select either a **Type** or an **Event** by clicking the radial buttons and selecting the options that apply.
6. Pick a **Sort/group by** option.
7. Use the check boxes to add any other information you wish to include.

8 Click **Print**.



Attendance by Event

Overview

The Attendance by Event report displays a variety of statistics that break down the attendance of events. This is one of the few reports in which the print preview can be drilled down to display additional information. For example, if you generate the report grouping by event, you can then click on an event name and get a list of everyone who attended that event during the time frame you chose. This allows the report to be flexible, and you can use it to generate multiple reports.

Key Parts

» Who—Contains a list of various groups of people, including members, enrollees, and people from a subgroup or list.

» Attendance—Allows you to choose a date range to pull attendance data from.

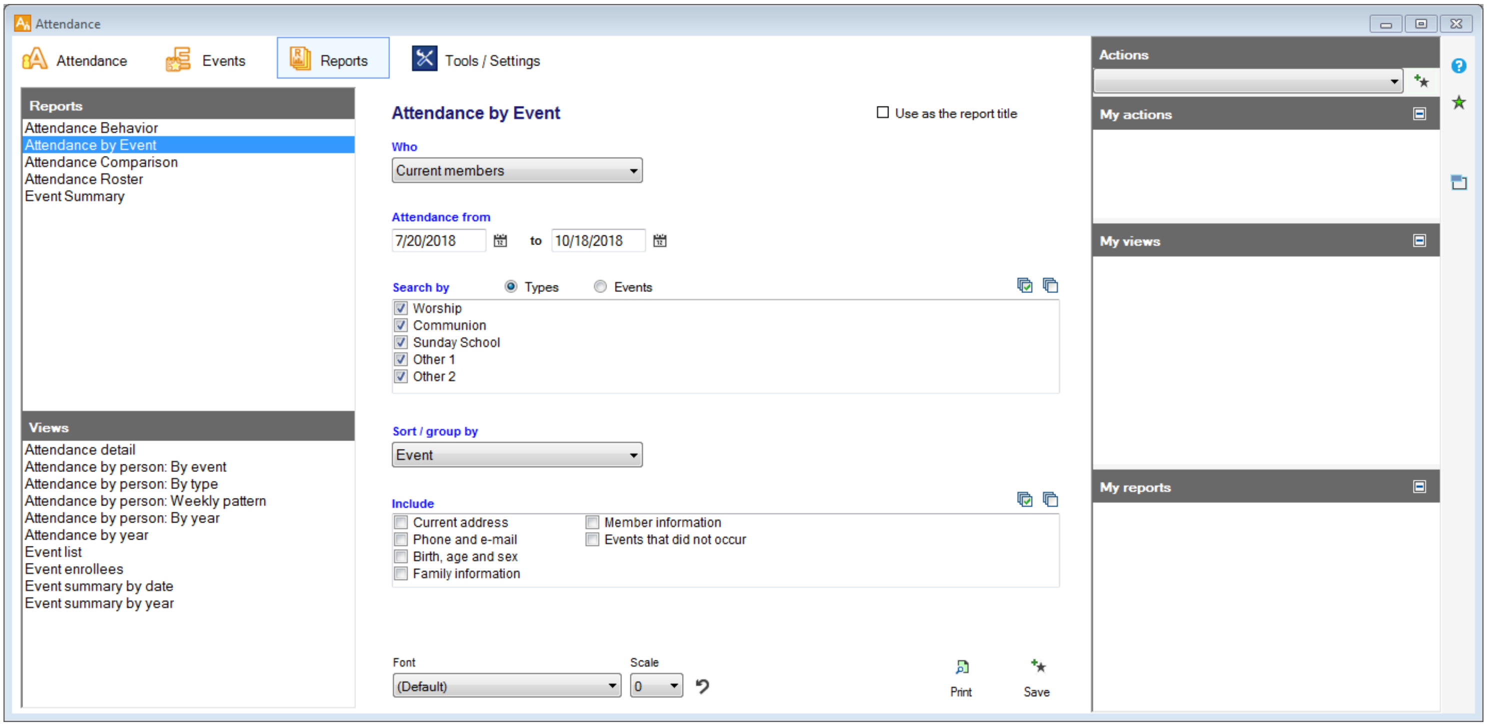
» Search by—Has two options that allow you to search by event type or by specific events.

» Sort/group by—Allows you to select how you want the list of people to be sorted by.

» Include—Adds to the report an assortment of information from the person profile.

Here is how to generate an Attendance by Event Report:

1. Open the Attendance module and select the **Reports tab,** then select **Attendance by Event** from the list of reports.
2. Select an option from the **Who** drop-down.
3. Pick a date range.
4. Select either a **Type** or an **Event** by clicking the radial buttons and selecting the options that apply.
5. Pick a **Sort/group by** option.
6. Use the check boxes to add any other information you wish to include.
7. Click **Print**.
8. In the print preview, you can double click a data type, and the report will drill down to display additional information.


Attendance
Attendance
Events
Reports
Tools / Settings
Reports
Attendance Behavior
Attendance by Event
Attendance Comparison
Attendance Roster
Event Summary
Views
Attendance detail
Attendance by person: By event
Attendance by person: By type
Attendance by person: Weekly pattern
Attendance by person: By year
Attendance by year
Event list
Event enrollees
Event summary by date
Event summary by year
Attendance by Event
Use as the report title
Who
Current members
Attendance from
7/20/2018
to
10/18/2018
Search by
Types
Events
Worship
Communion
Sunday School
Other 1
Other 2
Sort / group by
Event
Include
Current address
Phone and e-mail
Birth, age and sex
Family information
Member information
Events that did not occur
Font
(Default)
Scale
0
Print
Save
Actions
My actions
My views
My reports

Attendance Comparison

Overview

The Attendance Comparison report displays the total number of attendees for events over the course of one or multiple years for a set period of time. Like other reports, this report can be tailored to a specific group of people or event.

Unlike other reports, this one has two layouts. The layout affects not only how the page is printed out but also how the data is laid out on the page. If **Horizonal** is selected, data is displayed by event and event type. The total is broken down by the time period you choose, and only the total for the time period is listed. If **Vertical** is selected, the data is separated by time period and year, with each column being a different event type. This layout also includes the average attendance per event and the average attendance per year.

Key Parts

» Who—Contains a list of various groups of people, including members, enrollees, and people from a subgroup or list.

» Year—Determines the start and end year you want data to be displayed for.

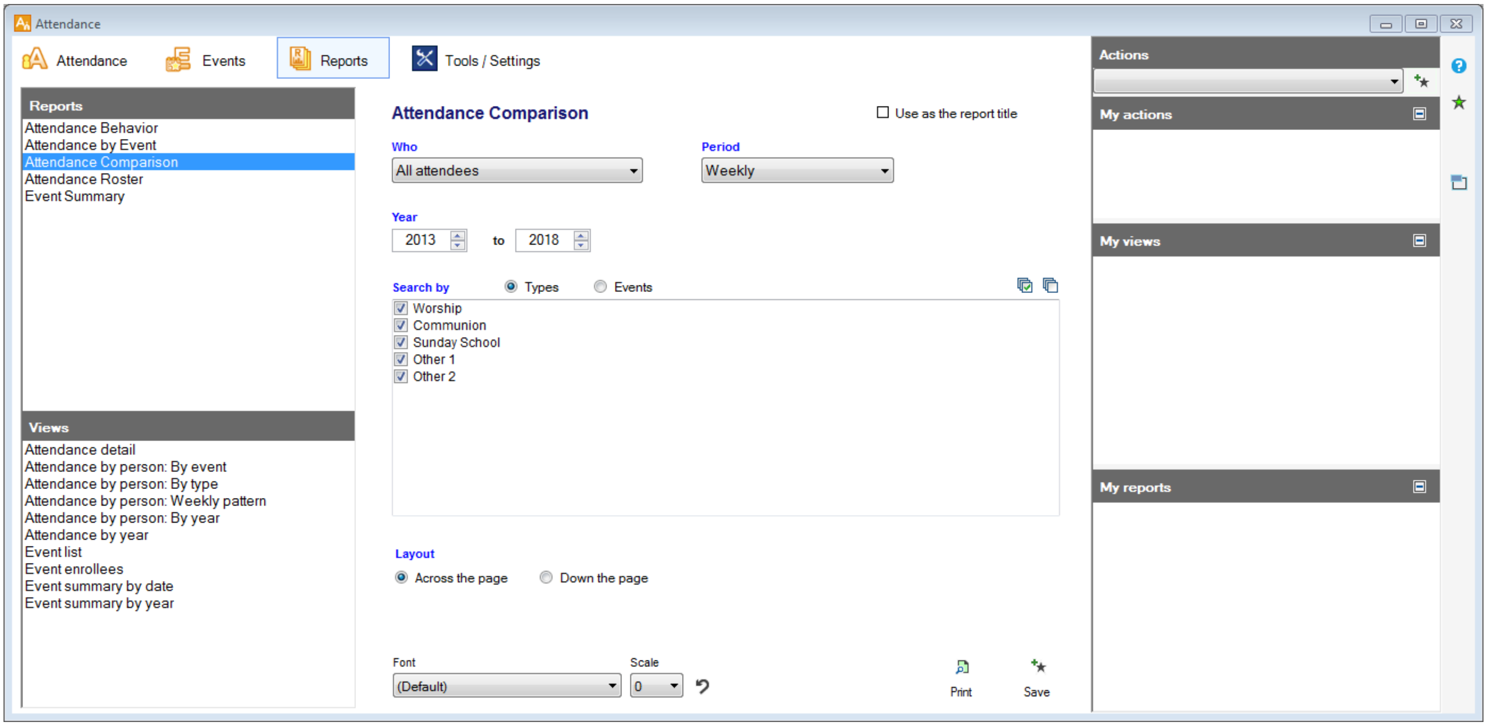
» Period—Determines the length of time you want data to be grouped by (weekly, monthly, quarterly, or yearly).

» Search by—Has two options that allow you to search by event type or by specific events.

» Layout—Changes the layout of the data on the page and what information is available in the report.

Here is how to generate an Attendance Comparison Report:

1. Open the Attendance module and select the **Reports tab,** then select **Attendance Comparison** from the list of reports.
2. Select an option from the **Who** drop-down.
3. Select a **Period**.
4. Pick a date range.
5. Select either a **Type** or an **Event** by clicking the radial buttons and selecting the options that apply.
6. Pick a **Layout**.
7. Click **Print**.


Attendance
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Tools / Settings
Reports
Attendance Behavior
Attendance by Event
Attendance Comparison
Attendance Roster
Event Summary
Views
Attendance detail
Attendance by person: By event
Attendance by person: By type
Attendance by person: Weekly pattern
Attendance by person: By year
Attendance by year
Event list
Event enrollees
Event summary by date
Event summary by year
Attendance Comparison
Use as the report title
Who
All attendees
Period
Weekly
Year
2013
to
2018
Search by
Types
Events
Worship
Communion
Sunday School
Other 1
Other 2
Layout
Across the page
Down the page
Font
(Default)
Scale
0
Print
Save
Actions
My actions
My views
My reports

Attendance Roster

Overview

Attendance Rosters are used to easily and quickly take attendance at events. In Shepherd's Staff®, the attendance rosters are designed to be flexible and usable for any event. There are three different types of rosters. **Sunday School** rosters can be formatted in various ways so that each teacher can have a different version. **Generic rosters** can be used in any situation but do not have any special format options. Lastly, a **blank roster** can be printed with only dates filled in; you will need to enter names and other information. Each roster can have a set start date and then be automatically incremented by a set time. The report will list a maximum of seventeen dates. In addition, rosters can include additional information, like birthdays and contact information.

Key Parts

» Who—Contains a list of various groups of people, including members, enrollees, and people from a subgroup or list.

» Type of Roster—Determines the type of roster that is generated: Sunday School, Generic, or Blank form.

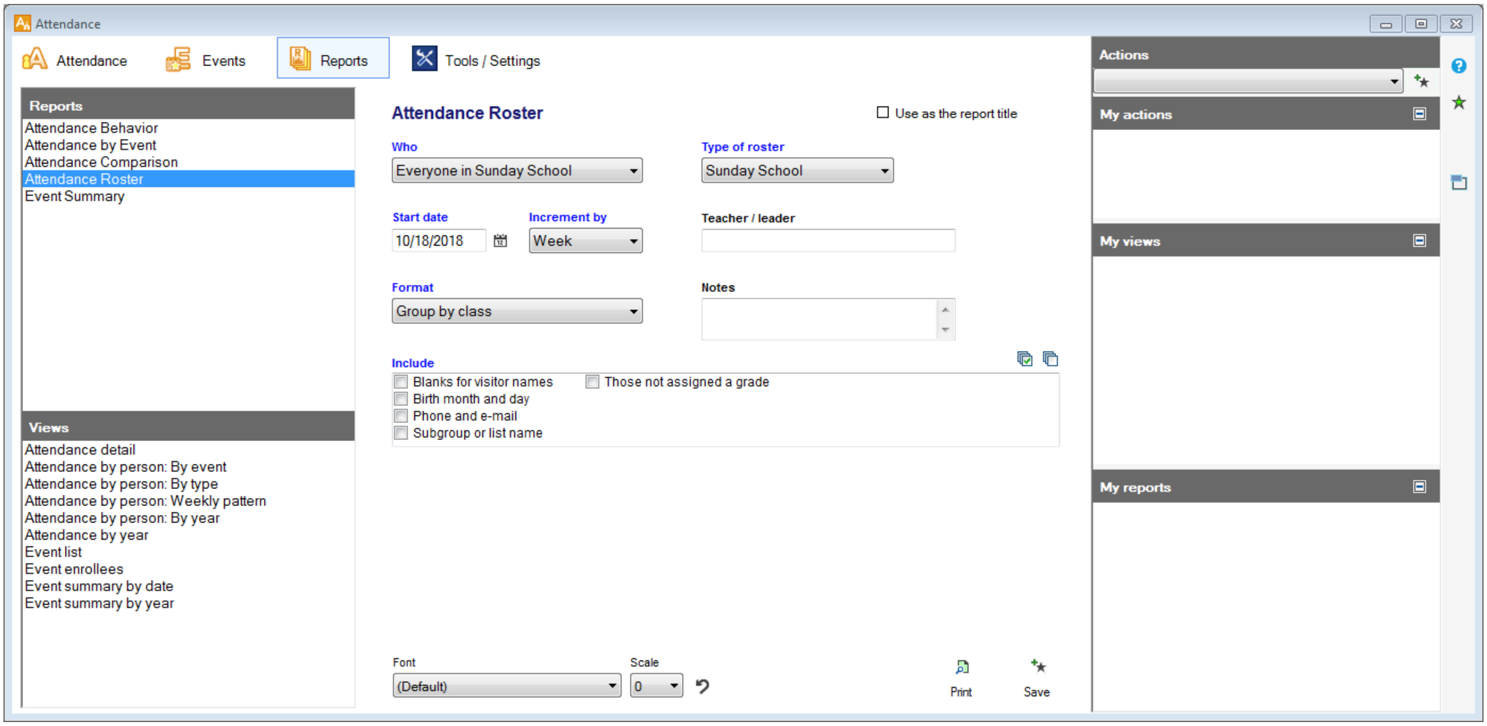
» Increment by—Controls the dates that are shown on the roster. This can be set to weekly, daily, or biweekly.

» Format—Specific to Sunday School rosters. These options format the list in different ways depending on if each class needs a roster or only one master roster is needed.

» Include—Lists additional information that can be added to the rosters, like birthdays and contact information.

Here is how to generate an Attendance Roster Report:

1. Open the Attendance module and select the **Reports tab,** then select **Attendance Roster** from the list of reports.
2. Select an option from the **Who** drop-down.
3. Choose the **Type of roster** you want to print.
4. Pick a **Start date** and an option under **Increment by**.
5. Select a **Format** from the drop-down (for Sunday School rosters only).
6. Use the check boxes to add any other information you wish to include (for Sunday School and Generic rosters only).
7. Add any additional notes (for Sunday School and Generic rosters only).
8. Click **Print**.


Attendance
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Attendance Behavior
Attendance by Event
Attendance Comparison
Attendance Roster
Event Summary
Views
Attendance detail
Attendance by person: By event
Attendance by person: By type
Attendance by person: Weekly pattern
Attendance by person: By year
Attendance by year
Event list
Event enrollees
Event summary by date
Event summary by year
Attendance Roster
Use as the report title
Who
Everyone in Sunday School
Type of roster
Sunday School
Start date
10/18/2018
Increment by
Week
Teacher / leader
Format
Group by class
Notes
Include
Blanks for visitor names
Those not assigned a grade
Birth month and day
Phone and e-mail
Subgroup or list name
Font
(Default)
Scale
0
Print
Save
Actions
My actions
My views
My reports

Event Summary

Overview

The **Event Summary** report is the perfect way to print off a summary of any number of events from a certain time period. This will quickly display the attendance, date, and other statistics of events. Like in other reports, you can choose whether to search by event type or by specific events, and you can include notes that will appear in the **Event Record**.

Key Terms

» Who—A list of various groups of people, including members, enrollees, and people from a subgroup or list.

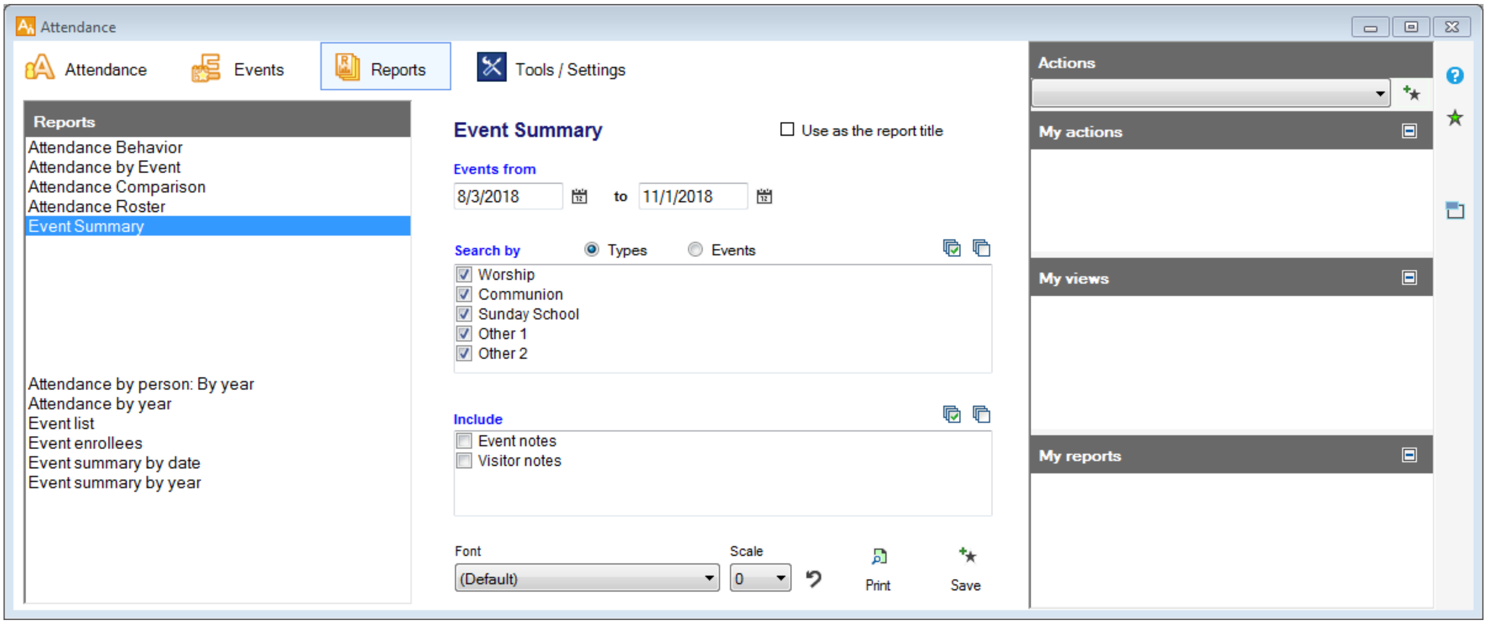
» Events from—The date range you want the report to display events from.

» Search by—Has two options that allow you to search by event type or by specific events.

» Include—Options to include event and visitor notes.

Here is how to generate an Event Summary report:

1. Open the Attendance module and select the **Reports tab,** then select **Event Summary** from the list of reports.
2. Select a date range using the **Event Summary** options.
3. Select either a **Type** or an **Event** by clicking the radial buttons, and select the options that apply.
4. Use the check boxes to **include** any other information.
5. Click **Print**.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Attendance
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Reports
Tools / Settings
Reports
Attendance Behavior
Attendance by Event
Attendance Comparison
Attendance Roster
Event Summary
Attendance by person: By year
Attendance by year
Event list
Event enrollees
Event summary by date
Event summary by year
Event Summary
Use as the report title
Events from
8/3/2018
to
11/1/2018
Search by
Types
Events
Worship
Communion
Sunday School
Other 1
Other 2
Include
Event notes
Visitor notes
Font
(Default)
Scale
0
Print
Save
Actions
My actions
My views
My reports

Subgroups

Introduction to Subgroups

Overview

A Subgroup is a specific list of people that is generated by the user or assembled by common traits. Subgroups are very useful as filters for printing reports and generating statistics when only a specific list of people is needed. There are three types of Subgroups: Dynamic, Static and Combined.

» Dynamic Subgroups use a set of criteria that generates a group of people at the time the list is assembled. This means that these Subgroups are automatically updated as you update information in the database.

» Static Subgroups, on the other hand, are sets of people that are added to the Subgroup manually by the user. Therefore, all changes to Static Subgroups must be done manually as well.

» Combined Subgroups are a combination of two or more Dynamic and/or Static Subgroups.

Shepherd's Staff has provided many pre-made Subgroups that can be edited to fit your specific church's needs.

There are four tabs in the Subgroups view. Each tab offers different options regarding the Subgroup that is selected.

» Subgroups—This view lists all of the Subgroups that have been created. This is where you can add, edit, and delete Subgroups. Like in other views, columns can be sorted and rearranged, and data can be searched with the use of the two search fields.

» People—This tab displays everyone that is included in the Subgroup you have selected. Like in other views, columns can be sorted and rearranged, and data can be searched with the use of the two search fields.

» Reports/Tools—This view contains some reports that provide information on subgroups and the people within them.

» Security—This tab is available only to users with permission to edit Subgroups.

> **Note**
>
> Subgroups can be made in Membership, Attendance, and Contributions. Regardless of where they are made, they can be accessed in any of these modules.

Here is how to use Subgroups:

1. Subgroups can be accessed by clicking on the Subgroups button in the Central Toolbar (Button with the

   From this window, you can add, edit, and delete Subgroups.

3. Click **Count** to quickly see the number of people and households in the Subgroup.
4. Click **Print** to show a report of the people in the Subgroup and some basic information.
5. Click the **Export** button to export a list of all the Subgroups. If you want to export the list of people within a Subgroup, **select the Subgroup** and then click on the **People tab**, which will give you the export option you need.

Dynamic Subgroups

Overview

Dynamic Subgroups are based on a set of criteria for fields within your database. Because Dynamic Subgroups use data in Shepherd’s Staff, the people in the list can change as the data changes. An example of this is a list of all active and confirmed members. A Subgroup like this will display all current active and confirmed members and not display those who do not meet those requirements. Once an active member is listed as “confirmed”, they will appear in the Subgroup.

The first part of a Subgroup is the field. This is the piece of data you want to filter people by. Options include membership status, address, envelope number, pledge status, and hundreds more types of fields that are organized into various categories. The second part is an operator, which is a characteristic that can be applied to the data. These are things like “Equal to”, “Greater than”, “Between”, and more. Lastly is the value. In many cases, the value is “Yes”, but it can also be a date, number, or other type.

> **Note**
>
> Multiple traits can be added to a Subgroup, and the more traits you add, the smaller your group will become. It's important to think about the specific traits you need to filter by and not include any extra traits that might filter people out who should otherwise be in your group.

Below are a few examples of Dynamic Subgroups you can make:

» All active confirmed members

Category	Field	Operator	Value
Church	Member?	Equal to	Yes
Church	Confirmed?	Equal to	Yes
Church	Participation	Equal to	Active

» All December birthdays

Category	Field	Operator	Value
Personal	Birth Month	Equal to	December

In this case, you will select “December” from a drop-down when you select the month. But in the Subgroup summary, the value will be displayed as “12”.

» Members between the ages of 25 and 45

Category	Field	Operator	Value
Church	Member?	Equal to	Yes
Personal	Age (as of today)	Between	25 and 45

Note

One thing that you will often want to do with your subgroups is to exclude any removed people. This is an easy trait to add to any subgroup. The field you would select is "Removed by" and the operator you would choose would be "is blank". This trait will make sure that only people whose "Removed by" field is empty.

Here is how to create a Dynamic Subgroup:

1. Open either the Membership, Attendance, or Contribution module.
2. Select the **Subgroup icon** in the main menu or toolbar.
3. Click **Add**.
4. Select **Dynamic** from the list of options.
5. Add a name for the Subgroup. A description and category are optional but can be helpful in managing the Subgroups.
6. Click **Add** to add a Subgroup trait. This will bring up a new window where the traits are selected.
7. Build the trait you want to add to the Subgroup by selecting a **Category**, then a **Field**, and finally an **Operator**. Lastly, enter the value from the **Find**
8. Click **Continue** to add the trait.
9. You can then add other traits, or edit or delete the ones you don’t want anymore.
10. Click **Save** once you are done.

Static Subgroups

Overview

Static Subgroups are lists of people that the user creates manually. A Static Subgroup should be used when a list of names is needed for which no data is common in Shepherd's Staff.

For example, the church has a softball team and labels are needed to send registration forms out. There is no field for "Softball Team" in Shepherd's Staff, so a Dynamic Subgroup cannot be made. Creating a Static Subgroup for the softball team is the only way that list can be used in Reports (such as Labels, Address Report, etc.).

A Static Subgroup can also be created by using a Dynamic Subgroup as the basis and then subtracting individuals from it. You can do this by using the **Static** button while you have a Dynamic Subgroup highlighted. This creates a Static Subgroup based on the results of the Dynamic Subgroup at that time.

> **Note**
>
> Static Subgroups are simply lists of people and will never update automatically.

Here is how to create a Static Subgroup:

1. Open the Membership, or Attendance module and click on the Subgroups button in the Central Toolbar
2. To make a Static Subgroup from a Dynamic Subgroup, highlight the Dynamic Subgroup and click the **Static** button. If you just want to create a Static Subgroup from scratch, click the **Add** button and choose **Static**.
3. Add a name for the Subgroup. A description and category are optional but can be helpful in managing the Subgroups.
4. Select people's names from the **Not in the subgroup** list, and click **Add**. If you need to remove people, select them from the **In the subgroup** list, and click **Remove**.
5. Click **Save** when you are done.

Combined Subgroups

Overview

Combined Subgroups are the product of two or more Dynamic and/or Static Subgroups added or subtracted together. These Subgroups are usually the right choice for the following:

» Subtractive Subgroup—You need exclusive information (in list A but not in list B). This is often the best way to find people who DID NOT "qualify" in your search. Start with all people who COULD qualify, subtract all people who DID qualify, and the remainder becomes all people who DIDN'T qualify.

» Additive Subgroup—You need inclusive information (in either list A or list B). It may help to think of this type as producing "or" results. This means that if you add two Subgroups, your results become anyone who was in one list OR the other list.

Here is how to create a combined Subgroup:

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. From the Subgroups window, click on Add and then select Combined.
3. Add a name for the Subgroup. A description and category are optional but can be helpful in managing the Subgroups.
4. Pick a Subgroup to start with from the drop-down. If this is a subtractive group, you will want to start with the list of people who COULD qualify. This is normally the larger of the groups. For the additive Subgroup, you can choose any of the lists to start off with.
5. Click the blue icon next to the field below to change it to a Plus (additive) or a Minus (subtractive).
6. Now choose the Subgroup you are subtracting away for a subtractive Subgroup, or the Subgroup you are adding to for an additive Subgroup. Once finished, click OK.
7. Click Save.

Subgroup List

The Subgroup List report provides a listing of all your subgroups, sorted by type (Dynamic, Static, Combined). This listing also includes the Category, Description, Last Used date, and which user used the subgroup last.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the subgroup window, and select "Subgroup List"
3. Click print to generate your report.

Subgroup Definitions

The Subgroup Definitions report will show you a listing of all your Dynamic or Combined subgroups and how those subgroups are built, showing each trait in the case of a Dynamic Subgroup, or each Subgroup in the case of a Combined Subgroup.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the Subgroups window, and select "Subgroup Definitions"
3. Select if you want to see your Dynamic or Combined subgroups.
4. Click print to generate your report.

Subgroups by Person

The Subgroups by Person report will let you pick a particular group, subgroup or list, and look at each individual in that list and provide you with each subgroup each person on that list is on. This can be handy especially when trying to ID what static subgroup people might be a part of, since they are not based on any criteria.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the Reports/Tools in the Subgroup window.
3. In the Who field, select what group of people you want to run this report for.
4. Click print to generate your list of people, with the subgroups they belong to.

Subgroup Security Report

The Subgroup Security report provides a listing of all your subgroups, sorted by type (Dynamic, Static, Combined). This listing also provides information on the needed permission levels to be able to access each smart group, by showing if you need to be a supervisor for Membership, Attendance, or Contributions to access the subgroup, or if the subgroup has been restricted for use to specific User ID's. This report will also show the last time each subgroup was used and by which user.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the Subgroups window, and select "Subgroup Security"
3. Click print to generate your report.

Subgroup Security

Overview

The Security tab on the Subgroups window allows you to specify who can make use of any Subgroup on a case-by-case basis. Each Subgroup carries its own security settings and can be adjusted to control access based on a user's module access or user ID. Only users with "Supervisor" access to all modules can access the Security tab.

When the Security tab is selected, you can set the security controls for whatever Subgroup is currently highlighted on the Subgroups tab.

Because Subgroups use information located throughout the program, ensuring that the information is secure is an important aspect of the Subgroups section.

Subgroups can be created or viewed using only modules for which a user already has access.

Here is how to set up Subgroup Security:

1. Open the Membership, Attendance, or Contributions module and click on **Subgroups**.
2. **Highlight the Subgroup** for which you want to set the permissions.
3. Click the **Security tab**.
4. You can choose to limit access based on whether a user has supervisor access to a certain module, or you can choose only specific users who can use the Subgroup.
5. Once you are finished, click **Save**.

Subgroup Cleanup

The Subgroup Cleanup utility will allow you to find subgroups that are either empty or have not been used in over 18 months. This utility is handy for maintaining your subgroup list, and trimming out subgroups that are no longer useful to your church.

1. Open the Membership or Attendance window click on the Subgroups icon on the Central Toolbar.
2. Click on the "Reports/Tools" tab in the Subgroups window, and select "Subgroup Cleanup"
3. Select if you want to look at your subgroups that are empty or unused, and click the "Start" button
4. You will be provided with a listing of your empty or unused subgroups. If you want more information on that subgroup, select it in the window, and click the "Details" button. This will show you with a window that provides the Name, Category, Description, Last Used Date and which user used the subgroup last.
5. If you would like to delete one of the subgroups on the list, select it and press Delete. This will delete the subgroup

Note: If a subgroup is a part of a combined subgroup, a window will appear when you attempt to delete the subgroup, letting you know what combined subgroup the subgroup you are trying to delete is in, and will not let you continue with the deletion

Tools and Settings

- Define a "Visitor"
- Other Setting
- Change Attendance Types
- Clean up Attendance Data
- Combine Attendance for Two People
- Fix Attendance Posting Mistake

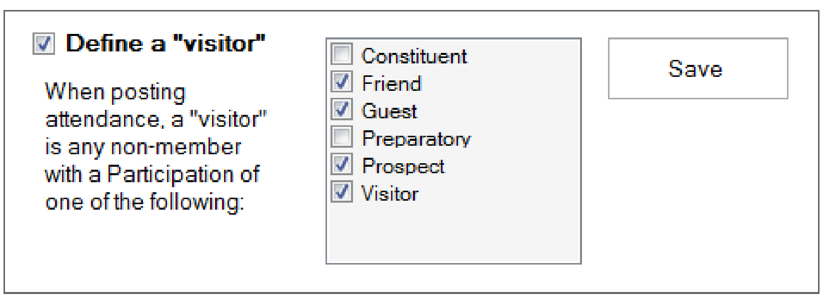
Define a "Visitor"

Overview

This utility allows you to set various Participation types that, when selected, will automatically mark any non-member as a visitor. These Participation types are most likely entered in the participation field of the person's profile in the Membership module. As of right now, the list of Participation options that are available cannot be changed or added to.

Here is how to define a visitor:

1. Review your membership data to determine what selections will work best for your church.
2. Open the **Attendance module** and select the **Tools/Settings**
3. **Check** the box next to **Define a "visitor"**.
4. Check the boxes for the definitions you are using in your membership data.
5. Click **Save**.



Other Setting

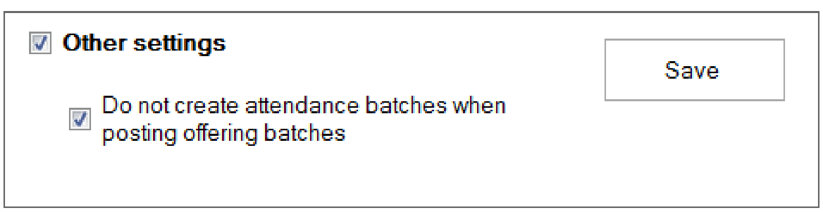
Overview

This section contains only one option, which controls whether to allow attendance batches to be automatically created when offering batches are posted. Checking the box will stop these attendance batches from automatically being created. Unchecking the box will allow them to be created.

This setting may be useful depending on the process you use when entering attendance and offerings. If you usually enter offerings first, you can uncheck the box, and an attendance batch will automatically be created containing all people who were included in the offering batch. This can save time for your church office.

Here is how to use the Other settings feature:

1. Open the **Attendance module** and select the **Tools/Settings**
2. **Check** the box next to **Other settings.**
3. Use the **check box** to select whether to create attendance batches when posting offering batches.



Change Attendance Types

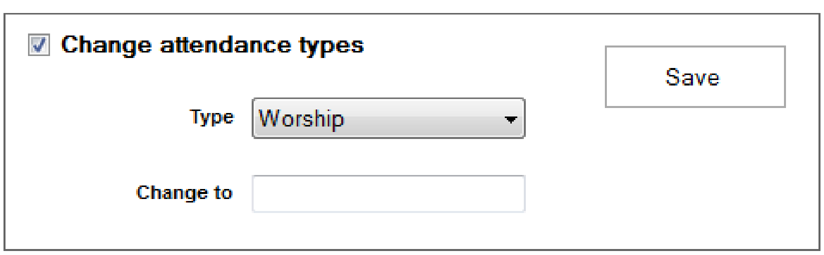
Overview

Attendance types allow you to categorize events, which is important for keeping attendance organized. Shepherd's Staff® has three default attendance types available: Worship, Communion, and Sunday School. In addition, you can add two custom attendance types using the **Change Attendance Types** utility in the **Tools/Settings** tab.

> **Note**
>
> The names of all attendance types can be changed at any time using this utility. After you change an attendance type's name, you will need to close and reopen the Attendance module for the data grids to display the new name.

Here is how to change the name of an attendance type:

1. When the **Attendance** module is open, select **Tools/Settings**.
2. **Check** the box next to the **Change attendance types**
3. Use the drop-down menu to select the attendance **Type** you want to rename.
4. Enter the new name in the **Change to**
5. Click **Save**.
6. **Close** and **reopen** the Attendance module.



Clean up Attendance Data

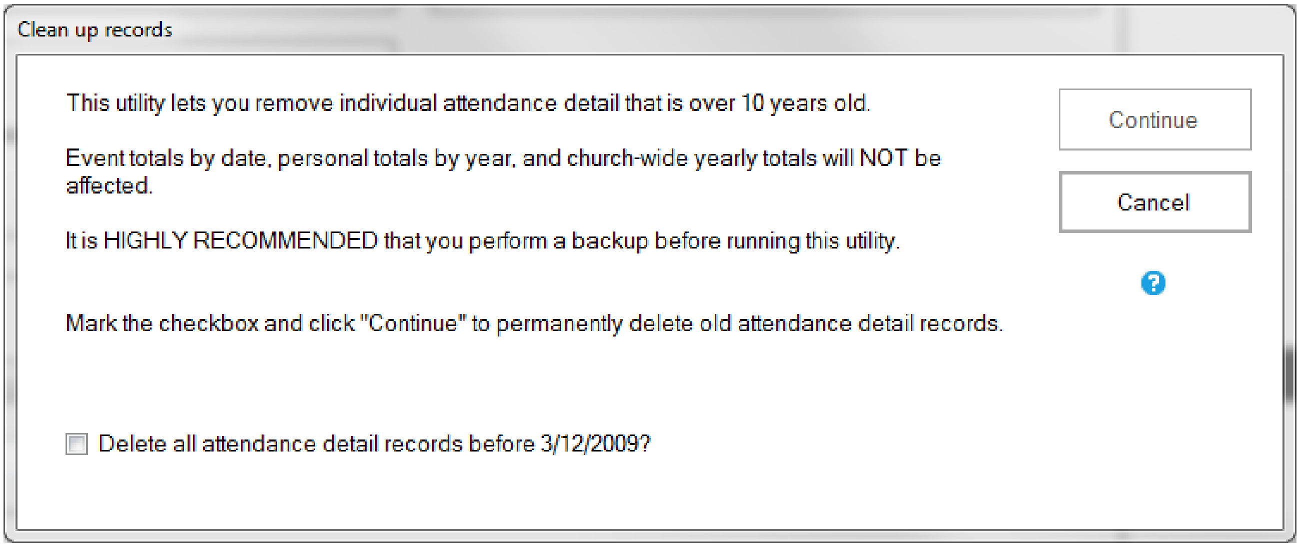
Overview

Over time, Shepherd's Staff® can build up a large amount of attendance data. Some of this data may not be needed anymore and will ultimately slow down the software. Because of this, a utility is included that will remove all attendance detail records that are more than ten years old. Information in the **Attendance by person/year**, **Attendance by year**, **Event by date**, and **Event by year** views will be retained, allowing you to see totals but not to see who specifically attended those events.

> **Warning**
>
> It is **HIGHLY** recommended that you perform a backup before using this utility. Once this utility has been run, there is no way to recover the information without restoring a backup.

Here is how to clean up your attendance data:

1. Back up your database!
2. Open the **Attendance** module and select the **Tools/Settings**
3. Under the **Tools** section, select **Clean up your attendance data**.
4. Click **Start**.
5. **Check the box** to confirm the removal of the records.
6. Click **Continue**.


Clean up records
This utility lets you remove individual attendance detail that is over 10 years old.
Event totals by date, personal totals by year, and church-wide yearly totals will NOT be affected.
It is HIGHLY RECOMMENDED that you perform a backup before running this utility.
Mark the checkbox and click "Continue" to permanently delete old attendance detail records.
Delete all attendance detail records before 3/12/2009?
Continue
Cancel

Combine Attendance for Two People

Overview

The Combine Attendance utility combines the attendance data of two people. This utility is helpful when you have two person records for the same person and both have attendance linked to them. After the utility is run, all attendance records and notes for those two people will be combined into one person.

All records for the two people are merged together. If both people are marked as attending the same event, the person being merged will simply be removed from the event. All notes will be merged as well.

> **Info**
>
> An alternative to this utility is the Combine People utility in the Membership module. This utility combines all membership, attendance, and contribution data and removes the person who was duplicated.

> **Warning**
>
> It is recommended that you perform a backup before using this utility. Once this utility is run, there is no way to recover the information without restoring a backup.

Here is how to combine the attendance of two people:

1. Back up your database.
2. Open **Attendance** and select the **Tools/Settings**
3. In the **Tools** section, select **Combine attendance for two people**.
4. Click **Start**.
5. Follow the directions in the window that appears. Select a **person to merge** in the first drop-down and select the **original person** in the second drop-down.
6. Click **Continue**.

Fix Attendance Posting Mistake

Overview

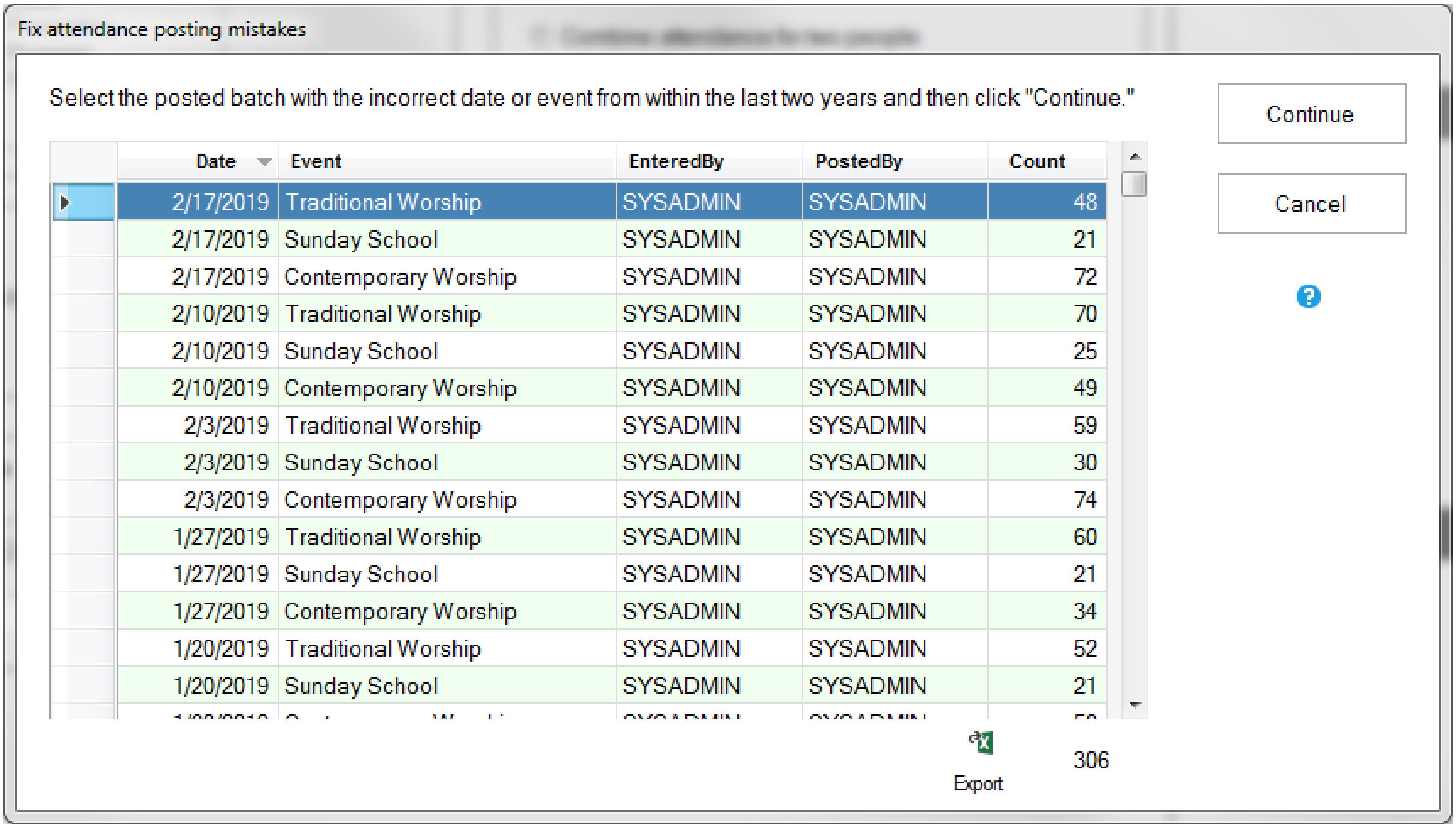
Once a batch is posted, there are limited options available for editing the batch. Attendance records can be added or removed manually, but there is no way to change the event, date, or type. To change the event, date, or type, you will need to use the Fix Attendance Posting Mistakes utility. If you created the event and attendance records manually, they will not show up in this utility.

This utility allows you to select a batch that was previously entered and change the date, event, or type. This will also change all attendance and event records associated with that batch and then update all grids.

> **Note**
>
> After the utility has been run, some views may not update fully until you close and reopen the Attendance module.

Here is how to fix an attendance posting mistake:

1. Open **Attendance** and select the **Tools/Settings**
2. Select **Fix attendance posting mistakes** under the **Tools**
3. Click **Start**.
4. Select the **Batch** you wish to change, and click **Continue**.
5. Make the desired changes to the batch by selecting the **check box** next to the option and selecting a new **date**, **event**, or **type**.
6. Click **Save**.



Fix attendance posting mistakes

Select the posted batch with the incorrect date or event from within the last two years and then click "Continue."

Date	Event	EnteredBy	PostedBy	Count
2/17/2019	Traditional Worship	SYSADMIN	SYSADMIN	48
2/17/2019	Sunday School	SYSADMIN	SYSADMIN	21
2/17/2019	Contemporary Worship	SYSADMIN	SYSADMIN	72
2/10/2019	Traditional Worship	SYSADMIN	SYSADMIN	70
2/10/2019	Sunday School	SYSADMIN	SYSADMIN	25
2/10/2019	Contemporary Worship	SYSADMIN	SYSADMIN	49
2/3/2019	Traditional Worship	SYSADMIN	SYSADMIN	59
2/3/2019	Sunday School	SYSADMIN	SYSADMIN	30
2/3/2019	Contemporary Worship	SYSADMIN	SYSADMIN	74
1/27/2019	Traditional Worship	SYSADMIN	SYSADMIN	60
1/27/2019	Sunday School	SYSADMIN	SYSADMIN	21
1/27/2019	Contemporary Worship	SYSADMIN	SYSADMIN	34
1/20/2019	Traditional Worship	SYSADMIN	SYSADMIN	52
1/20/2019	Sunday School	SYSADMIN	SYSADMIN	21

Continue

Cancel

Export

306

WebTools

- Accessing WebTools
- Entering Attendance
- Edit a Batch in Webtools
- Importing Attendance Batches from WebTools

Accessing WebTools

Overview

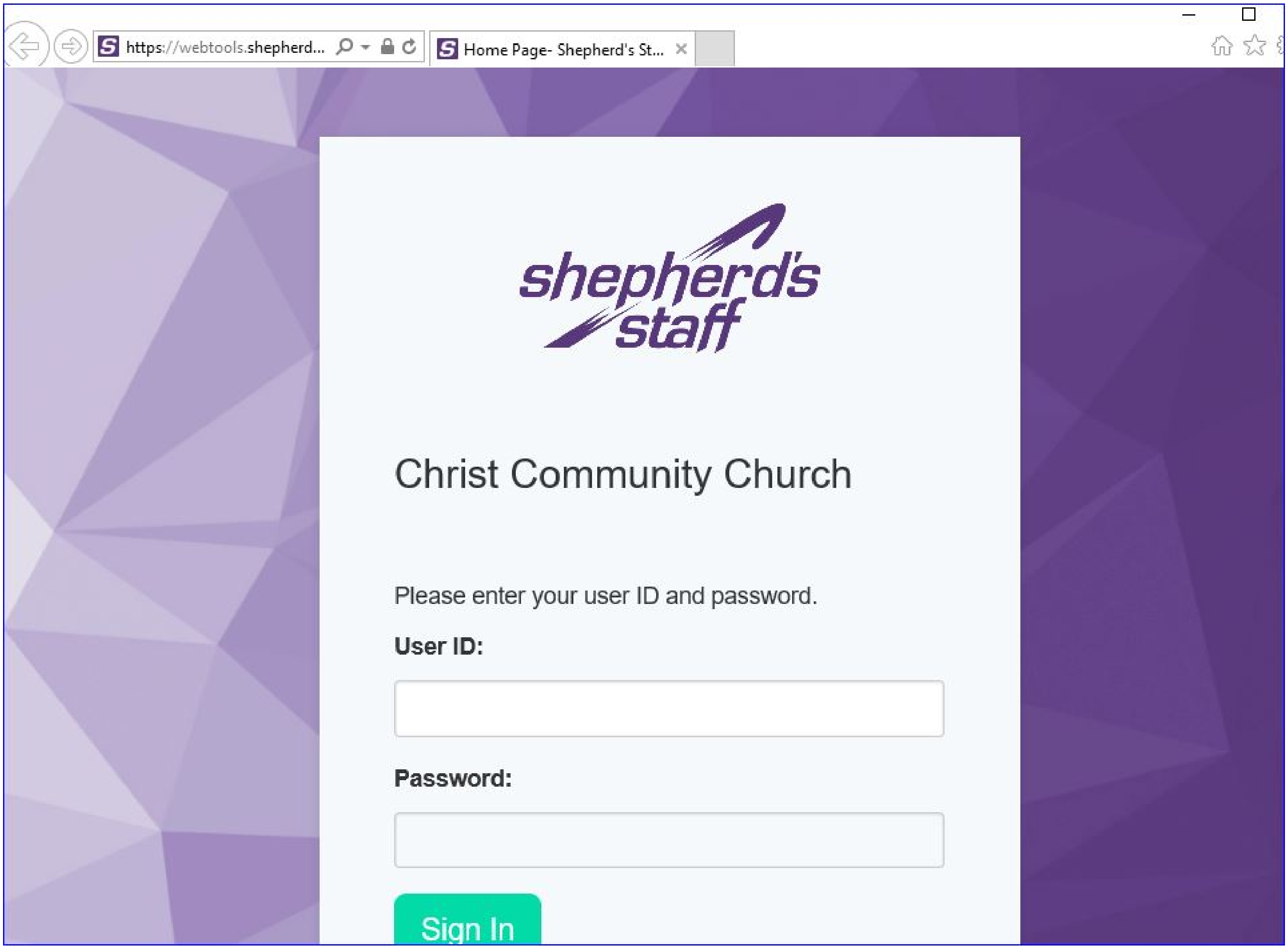
Every Shepherd's Staff® customer who has an active support contract has the option of accessing their own secure WebTools site. The data kept in WebTools is safe, and only those individuals with a login to your Shepherd's Staff database can access your WebTools site. Keep your WebTools URL handy because the only way to get it is by logging into Shepherd's Staff. You can always copy and paste the URL into an email and send it to a church staff member so they can use WebTools.

All users who have a username for your Shepherd's Staff database will use their same username and password to log into WebTools. Security settings will carry over from Shepherd's Staff to WebTools. If a user only has access to enter offerings in Shepherd's Staff, they will only be able to access the offering portion of WebTools.

You can find the link to your WebTools site by going to either of the following places:

» Click **Utilities** on the Main Menu, click **Settings**, and click the **Web** tab.

» In the Membership, Attendance, or Contributions modules, you will find a **WebTools icon** in the navigation bar. Click on the icon to go to the site or to copy the URL.


https://webtools.shepherd...
Home Page- Shepherd's St...
shepherd's staff
Christ Community Church
Please enter your user ID and password.
User ID:
Password:
Sign In

Entering Attendance

Overview

Entering attendance in WebTools is easy and simple. It allows you—or volunteers—to enter attendance from home if you do not have the ability to enter it from the church office. The attendance batches in WebTools are a simplified form of the attendance batches in Shepherd's Staff®. There is no way to add guests in WebTools (you can list them in the notes), and WebTools automatically assumes that members who are confirmed take Communion.

People can be added both individually and as families to make things easy and quick. In addition, you can sort everyone into categories by clicking the tabs under the search bar. The categories available are Members, Enrollees, and Non-members.

Key Parts

» Search—This can be used to quickly find an individual or household. You can search for a full name or just part of a name.

» People tabs—Under the search bar, you will find several tabs that allow you to sort the list of people to easily find individuals.

» Adding people—The first row of each household will have two icons. The icon on the left will add the entire family. The icon on the right will add only a single person. You can add people to the list by clicking either icon.

» People attended—A list of people who attended the event will start to form at the bottom of the page. This will display everyone who was marked as attended.

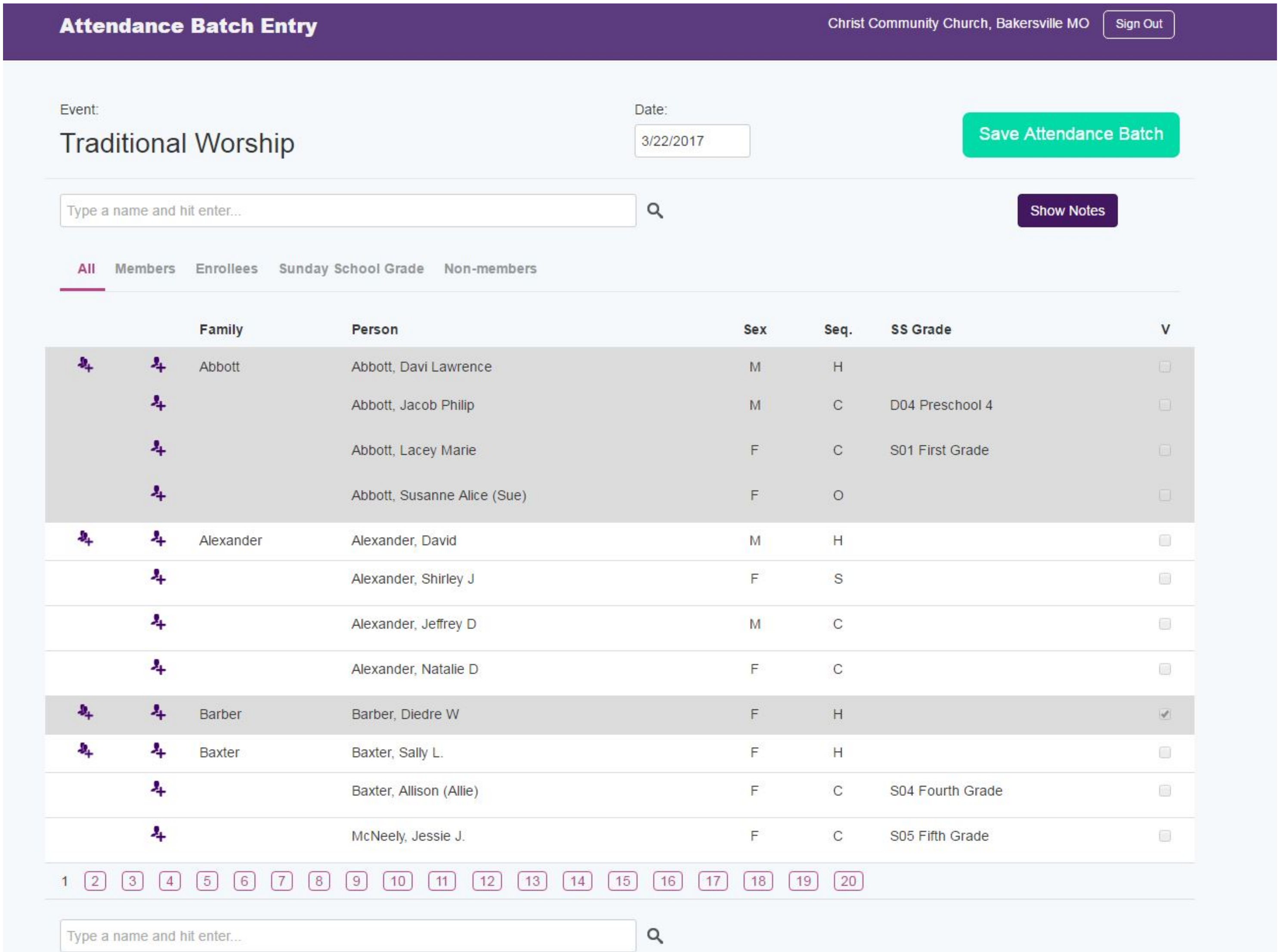
» Communion—If the event has Communion, WebTools will by default mark all people as having participated in Communion. To change this, you will need to edit the row by clicking the pen icon next to each person's name and clicking the Communion check box.

Here is how to create an attendance batch:

1. Log into WebTools.
2. Click the **Attendance Batches** tab.
3. Click **Add a Batch**.
4. Select a **date** and an **event**, and click **Continue**.
5. Click the **purple icons** to add people to the batch.

6 When you are finished, click **Save Batch**.

7 Go back to the main Attendance Batches tab, and click the **status** of the new batch. Changing the status from “In process” to “Ready” will allow you to import the batch into Shepherd's Staff.



Edit a Batch in Webtools

Overview

You can edit an attendance batch in WebTools any time before it has been imported into Shepherd’s Staff®. After it has been imported, the batch will need to be edited in Shepherd’s Staff.

While editing a batch in WebTools, you can change the date of the batch, and you can delete and edit rows just like you can in Shepherd's Staff. In addition, you can always import the batch into Shepherd's Staff and edit it that way.

Key Parts

» Edit—You can edit a line in the batch by clicking the pen icon on the row you wish to edit. This will allow you to change the person’s participation in Communion or their worship attendance. Afterward, be sure to click the **Save Batch** button to save your changes.

» Delete—On the far right side of each row, you will see a red icon. Clicking this will remove a person from the attended list.

Here is how to edit a batch:

1. Log into WebTools.
2. Go to the **Attendance Batches**
3. Click **Open** for the batch you wish to edit. This will open the same view as if you were starting a new batch, but it will include all the previously entered data.
4. Below the list of people who can be added, you will see a list of people already added to the batch. You can edit anyone by clicking the **pen icon** on the left side of their row.
5. WebTools will automatically assume everyone added took Communion if the service you selected has Communion. You can edit people’s Communion participation by clicking the **pen icon** next to each person and then unchecking the **box in the Communion column**.
6. You can delete a person from the batch by clicking the **red icon** on the far right side of their row.

		Beaubien	Beaubien, James T	M	H		
			Beaubien, Ellen	F	S		
		Belton	Belton, Troy James	M	H		
			Belton, Kira Lynn	F	S		
			Belton, Darin Peter	M	C	K01 Kindergarten	
			Belton, Lena Helen	F	C	S02 Second Grade	
		Benedict	Benedict, Ti Ronald	M	H		
		Billings	Billings, Julie A.	F	H		

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20

Type a name and hit enter...

	Family	Name	Worship	Communion	Sex	Seq.	SS Grade	V	
	Abbott	Abbott, Davi Lawrence	✓	✓	M	H			
	Abbott	Abbott, Jacob Philip	✓	✓	M	C	D04 Preschool 4		
	Abbott	Abbott, Lacey Marie	✓	✓	F	C	S01 First Grade		
	Abbott	Abbott, Susanne Alice (Sue)	✓	✓	F	O			
	Alexander	Alexander, David	✓	✓	M	H			
	Alexander	Alexander, Shirley J	✓	✓	F	S			
	Alexander	Alexander, Jeffrey D	✓	✓	M	C			
	Alexander	Alexander, Natalie D	✓	✓	F	C			

Save Attendance Batch

Importing Attendance Batches from WebTools

Overview

After you have completed an attendance batch in WebTools, the batch is ready to be imported into Shepherd's Staff. The first step to making the import happen is to change the batch's status in WebTools from "In process" to "Ready". You can change the status by clicking on the status that is listed. Then you can open Shepherd's Staff, import the batch, and post the batch.

Statues

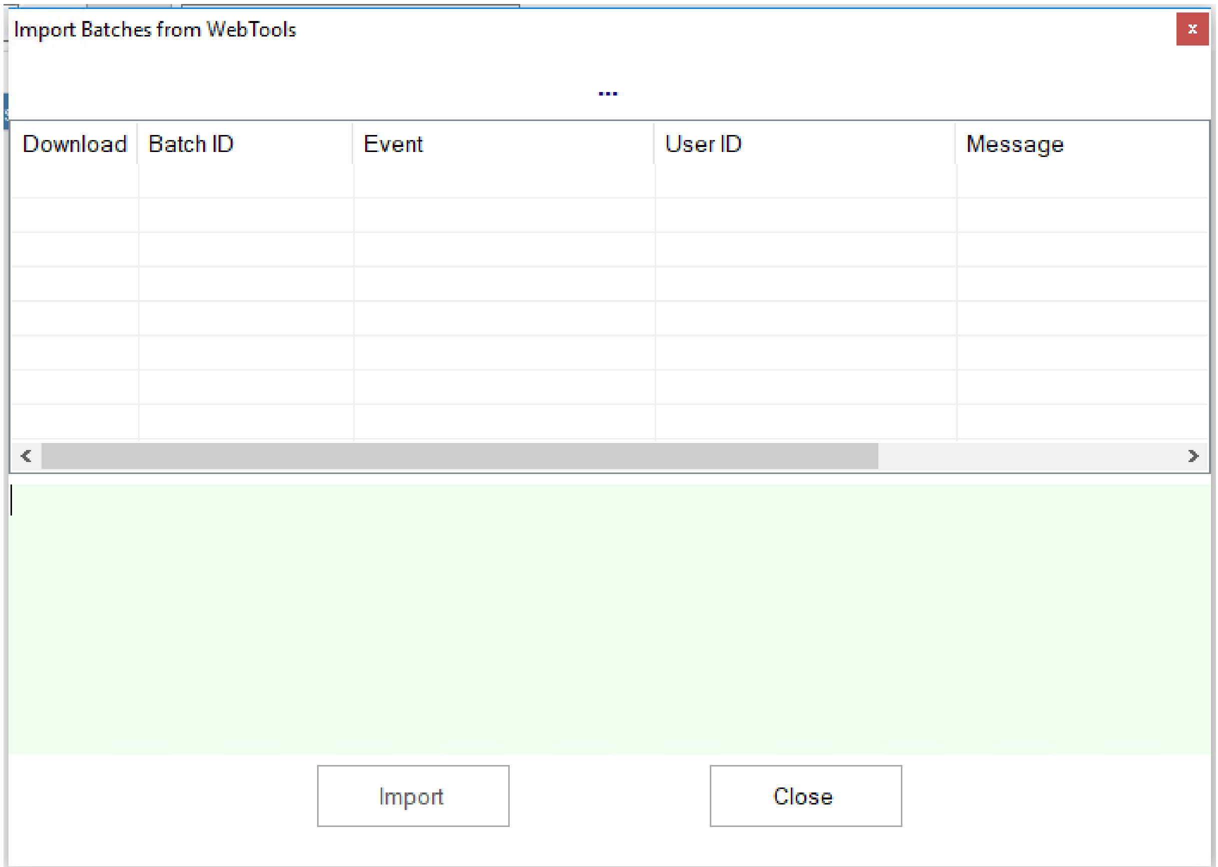
» In Process—This means the batch is still being worked on. Changes can be made to the batch in WebTools only when the batch is listed as "In process".

» Ready—This means the batch is ready to be imported into Shepherd's Staff. When a batch has this status, it cannot be edited in WebTools. However, you can change the status back to "In process" to edit it in WebTools, or you can edit it in Shepherd's Staff after you have imported it.

> **Note**
>
> After a batch has been imported into Shepherd's Staff, it will be removed from WebTools.

Here is how to import a batch from WebTools:

1. Log into WebTools.
2. Click the **Attendance Batches** tab to view the attendance batches.
3. Click on the **status** of the batch you want to import to change it to "Ready".
4. Open Shepherd's Staff and open the **Attendance module**.
5. On the Attendance table that opens, navigate to the **Batches tab**.
6. Click on the **WebTools icon** at the bottom of the window.
7. Select the **batch you want to import**, then click **Import**.


Import Batches from WebTools
...
Download
Batch ID
Event
User ID
Message
Import
Close