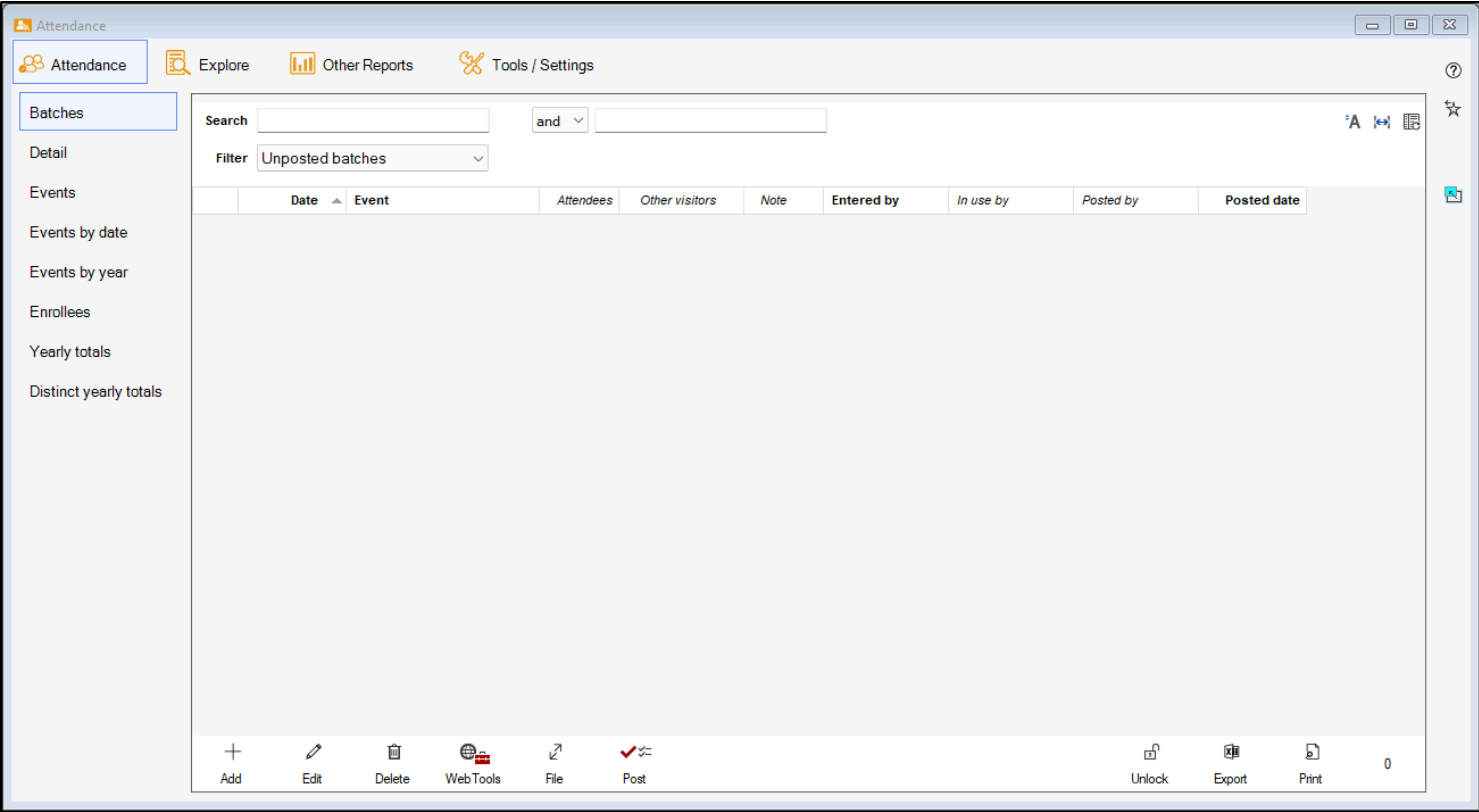


Shepherd's Staff Attendance Manual

Introduction to Attendance

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**.



Batches

Overview

An attendance batch is used to add the attendance for an event on a particular date. 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 by 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 mistakes** 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.

Search and

Filter

Date	Event	Attendees	Other visitors	Note	Entered by	In use by	Posted by	Posted date
------	-------	-----------	----------------	------	------------	-----------	-----------	-------------

+ Add Edit Delete WebTools File Post Unlock Export Print 0

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 is 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**.

[illegible]

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 Posting 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, people who have attended within the last 45, 90 or 180 days, 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**.

on Sunday, May 8, 2022

Possible Attendees (257)

Who?

(everyone)

	Household	Full Name	S	A
▶	Abbott	Abbott, David Lawrence (Dave)		
	Abbott	Abbott, Susanne Alice (Sue)		
	Abbott	Abbott, Lacey Marie	KI	
	Abbott	Abbott, Jacob Philip	D	
	Alexander	Alexander, David		
	Alexander	Alexander, Shirley J		
	Alexander	Alexander, Jeffrey D	S	
	Alexander	Alexander, Natalie D	D	
	ALLENS	ALLENS, Clark		
	ALLENS	ALLENS, Julie		
	ALLENS	ALLENS, Matthew		
	Barber	Barber, Diedre W		
	Baxter	Baxter, Sally L.		
	Baxter	McNeely, Jessie J.	S	
	Baxter	Baxter, Allison (Allie)	S	
	Beaubien	Beaubien, James T		
	Beaubien	Beaubien, Ellen		
	Belton	Belton, Troy James		
	Belton	Belton, Kira Lynn		
	Belton	Belton, Lena Helen	S	
	Belton	Belton, Darin Peter	KI	
<	Benedict	Benedict, Timothy Ronald (Tim)		>

- ☒ 1 - Worship
- ☒ 2 - Communion

+

Add

—

Remove



Add visitor



Add all

 Remove all

Search by:

- ☒ Household
- ☐ Person

--

1	2	V	Household	Full Name

Save

Close

Note

Visitors



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**.

Traditional Worship
on Sunday, August 28, 2022

Possible Attendees (257)

Household	Full Name
Abbott	Abbott, David Lawrence (Dave)
Abbott	Abbott, Susanne Alice (Sue)
Abbott	Abbott, Lacey Marie
Abbott	Abbott, Jacob Philip
Alexander	Alexander, David
Alexander	Alexander, Shirley J
Alexander	Alexander, Jeffrey D
Alexander	Alexander, Natalie D
ALLENS	ALLENS, Clark
ALLENS	ALLENS, Julie
ALLENS	ALLENS, Matthew
Barber	Barber, Diedre W
Baxter	Baxter, Sally L
Baxter	McNeely, Jessie J.
Baxter	Baxter, Allison (Allie)
Beaubien	Beaubien, James T
Beaubien	Beaubien, Ellen
Belton	Belton, Troy James
Belton	Belton, Kira Lynn
Belton	Belton, Lena Helen
Belton	Belton, Darin Peter
Beaudet	Beaudet, Timothy Donald (Tim)

Who? (everyone)

Visitors

	In Batch	Other	Total
Worship	0	0	0
Communion	0	0	0

Visitor names, contact information, or other notes

Save

Cancel

Save

Close

Note

Visitors

Search by:

☒ Household

☐ Person

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.

Edit an event summary

Event
Contemporary Worship

Date of Event
10/2/2022

Enter the total non-visitors and visitors that attended:

Worship

Non-visitors	Visitors	Total
121	21	142

Communion

Non-visitors	Visitors	Total
18	0	18

Total

Non-visitors	Visitors	All	Calculate using
121	21	142	Highest number

Save

Cancel

Note

Visitor

?

The name and date of the event cannot be changed because there is attendance detail.

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** tab, then choose **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.

1 - Attendance

2 - Events

3 - Other Reports

4 - Tools / Settings

Events

By date

By year

Enrollees

Search

Event (all)

Event	Date
50th Anniversary	8/28/2022
Contemporary Worship	10/2/2022
Contemporary Worship	9/25/2022
Contemporary Worship	9/18/2022
Contemporary Worship	9/11/2022
Contemporary Worship	8/14/2022
Contemporary Worship	5/29/2022
Contemporary Worship	5/22/2022
Contemporary Worship	5/15/2022
Contemporary Worship	5/8/2022
Contemporary Worship	4/17/2022
Contemporary Worship	7/12/2020
Contemporary Worship	7/5/2020
Contemporary Worship	6/28/2020
Contemporary Worship	6/21/2020
Contemporary Worship	6/14/2020
Contemporary Worship	6/7/2020
Contemporary Worship	5/31/2020
Contemporary Worship	5/24/2020
Contemporary Worship	5/17/2020
Contemporary Worship	5/10/2020
Contemporary Worship	5/3/2020
Contemporary Worship	4/26/2020

+

Add

✎

Edit

📄

Copy

🗑

Delete

Add an event summary

Event

Date of Event

Save

Cancel

Note

Visitor

?

Export

Print

Save

1348

+

Add

✎

Edit

📄

Copy

🗑

Delete

📄

Export

🖨

Print

★

Save

1348

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 at the bottom of the window.
- 3 A new window will appear. By default, **Export** will be marked under **Actions**.
- 4 Select the **Batch(es)** 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 at the bottom of the window.
- 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 **Batch(es)** 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 you 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** at the bottom of the screen.
- 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.

Search

and

☒ Last 24 months

A

Filter

(no filter)

Who

(everyone)

+

✎

📄

🗑

Subgroup

Export

Print

★

10,394

Add

Edit

Copy

Delete

Add an attendance record

* Person

Save

* Event

Cancel

* Date of Event

📅

☐ Visitor? (at time of event)

?

☐ Add Multiple?

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.

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 then select the **Events by date view**.
- 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**.

Search

and

A ↕ 📄

Event

(all)



	Event ▲	Date	Non-visitors	Visitors	Total	Active?
▶	Contemporary Worship	11/24/2024	59	0	59	✓
	Contemporary Worship	11/17/2024	54	0	54	✓
	Contemporary Worship	11/10/2024	71	0	71	✓
	Contemporary Worship	11/3/2024	69	0	69	✓
	Contemporary Worship	10/27/2024	61	0	61	✓
	Contemporary Worship	10/20/2024	55	0	55	✓
	Contemporary Worship	10/13/2024	77	0	77	✓
	Contemporary Worship	10/6/2024	51	0	51	✓
	Contemporary Worship	10/6/2024	67	0	67	✓
	Contemporary Worship	9/22/2024	68	0	68	✓
	Contemporary Worship	9/15/2024	71	0	71	✓
	Contemporary Worship	9/8/2024	50	0	50	✓
	Contemporary Worship	9/1/2024	69	0	69	✓
	Contemporary Worship	8/25/2024	62	0	62	✓
	Contemporary Worship	8/18/2024	63	0	63	✓
	Contemporary Worship	8/11/2024	77	0	77	✓
	Contemporary Worship	8/4/2024	66	0	66	✓
	Contemporary Worship	7/28/2024	55	0	55	✓
	Contemporary Worship	7/21/2024	66	0	66	✓
	Contemporary Worship	7/14/2024	68	0	68	✓



Add



Edit



Copy



Delete



Notes



Export



Print



Save

1,866

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 and clicking on the **Events by year** tab.

Search

and

A

	Event	Year	Times	Last	Total	Average	Median	Non-visitors	Average	Median	Visitors	Average	Med
▶	Contemporary Worship	2024	48	11/24/2024	3066	63	64	3063	63	64	3	0	
	Contemporary Worship	2023	52	12/24/2023	3779	72	73	3775	72	73	4	0	
	Contemporary Worship	2022	52	12/25/2022	3633	69	72	3633	69	72	0	0	
	Contemporary Worship	2021	52	12/26/2021	3152	60	56	3025	58	54	127	2	
	Contemporary Worship	2020	52	12/27/2020	3028	58	57	2898	55	54	130	2	
	Contemporary Worship	2019	52	12/29/2019	2983	57	54	2890	55	53	93	1	
	Contemporary Worship	2018	53	12/30/2018	3037	57	53	2921	55	51	116	2	
	Contemporary Worship	2017	52	12/24/2017	2929	56	54	2831	54	52	98	1	
	Contemporary Worship	2016	52	12/25/2016	2935	56	54	2849	54	53	86	1	
	Contemporary Worship	2015	52	12/27/2015	2970	57	52	2848	54	52	122	2	
	Contemporary Worship	2014	52	12/28/2014	2936	56	54	2845	54	53	96	1	
	Contemporary Worship	2013	53	12/29/2013	3003	56	51	2907	54	51	96	1	
	Sunday School	2024	48	11/24/2024	1435	29	30	1434	29	30	1	0	
	Sunday School	2023	52	12/24/2023	1604	30	31	1604	30	31	0	0	
	Sunday School	2022	52	12/25/2022	1499	28	29	1499	28	29	0	0	
	Sunday School	2021	52	12/26/2021	1405	27	26	1405	27	26	0	0	
	Sunday School	2020	52	12/27/2020	1293	24	25	1293	24	25	0	0	
	Sunday School	2019	52	12/29/2019	1297	24	25	1297	24	25	0	0	
	Sunday School	2018	53	12/30/2018	1315	24	24	1315	24	24	0	0	
	Sunday School	2017	52	12/24/2017	1313	25	25	1313	25	25	0	0	
	Sunday School	2016	52	12/25/2016	1285	24	25	1285	24	25	0	0	
	Sunday School	2015	52	12/27/2015	1237	23	23	1237	23	23	0	0	

Export

Print

Save

36

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 **Attendance** tab, then select the **Enrollees view**.
- 2 Select a row for the event for which you want to add or remove enrollees.
- 3 Click **Change** below the grid 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. You can select which group of people you want to select from by selecting the group you want in the **Filter** field. 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**.

Search	<input type="text"/>	and	<input type="text"/>	  
Event	(all) 	Who	(everyone) 	
	Event	Enrollee	Last attended	Member?
▶	Contemporary Worship	Abbott, David L. (Dave)	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Abbott, Jacob P.	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Abbott, Lacey M.	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Abbott, Susanne A. (Sue)	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Belton, Darin P.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Belton, Kira L.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Belton, Lena H.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Belton, Troy J.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Carter, Brandon J.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Carter, Michelle R.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Carter, Teresa W.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Freeman, Jason W.	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Graham, Jacqueline Y. (Jackie)	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Graham, Philip M. (Phil)	11/24/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Henry Jr., James P.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Henry, Antonio J. (Tony)	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Henry, Nina M.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Henry, Rosa M.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Holdren, Hattie M.	11/17/2024	<input checked="" type="checkbox"/>
	Contemporary Worship	Holdren, Ryan D.	11/17/2024	<input checked="" type="checkbox"/>

 Change
  E-mail
  Subgroup
  Export
  Print
  Save
 151

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

☐ Inactive?

☐ Enable Secure Check-in for Enrollees

Save

Cancel

Note

?

Enrollees: 59

Kiosk 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

Add enrollees

Possible Enrollees (180)

Alexander, David

Alexander, Jeffrey D

Alexander, Natalie D

Alexander, Shirley J

Barber, Diedre W

Baxter, Allison (Allie)

Baxter, Sally L.

Beaubien, Ellen

Beaubien, James T

Benedict, Timothy Ronald (Tim)

Billings, Julie A.

Bowen, Claire

Bowen, Rick

Brown, Howard Raymond

Callaway, Brian Patrick

Callaway, Charlotte Grace

Callaway, Kelly Nicole

Callaway, Robert William (Rob)

Carroll, Carmen Janice

Carter, Leon

Chung, Brian H.

Chung, Lina Caroline

Chung, Molly

+
Add

-
Remove

+ +
Add all

- -
Remove all

Selected: 0

☒ ☐

Filter

(everyone)

Selected Enrollees (59)

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.

Continue

Cancel

?

Selected: 0

☒ ☐

Yearly Totals

Overview

Most churches will have historical attendance data they would like to add into Shepherd's Staff® without having to enter each attendance date as a **batch**. The Year Summary view allows you to enter an entire year's 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 **Yearly totals view**.
- 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.

	Year ▾	Non-visitors Worship	Visitors Worship	Worship Totals	Non-visitors Communion	Visitors Communion	Communion Totals	Non-visitors Sunday School	Visitors Sunday School	Sunday School Totals
▶	2024	5904	5	5909	5666	5	5671	1434	1	1435
	2023	7267	4	7271	7031	4	7035	1604	0	1604
	2022	6973	0	6973	6747	0	6747	1499	0	1499
	2021	5740	362	6102	5528	328	5856	1405	0	1405
	2020	5562	417	5979	5481	354	5835	1293	0	1293
	2019	5503	301	5804	5503	118	5621	1276	0	1276
	2018	5667	388	6055	4979	-6	4973	1318	0	1318
	2017	5488	340	5828	3460	0	3460	1313	0	1313
	2016	5423	286	5709	3445	0	3445	1285	0	1285
	2015	5433	415	5848	3430	0	3430	1237	0	1237
	2014	5715	295	6010	3619	0	3619	1376	0	1376
	2013	5911	121	6032	3565	0	3565	1358	0	1358

Distinct Yearly Totals

The "Distinct Yearly Totals" view provides a listing of all years attendance has been recorded in Shepherd's Staff and provides the number of unique people who attended across worship types, broken down by visitor and non-visitor.

- 1. To access the "Distinct Yearly Totals" view, open the attendance module and in the Attendance tab, click on the "Distinct yearly totals" section
- 2. You will be presented with a graph that shows each complete year and provides the number of unique people who attended across multiple attendance types. For each attendance type, you will see a number of non-visitors, visitors and then a total.
- 3. Clicking "Export" will send this graph to your spreadsheet program, clicking "Print" will provide a printable version of this report" and clicking save will allow you to add this view to the "My Views" section

Search

and

'A'

	Year	Non-visitors Worship	Visitors Worship	Worship Totals	Non-visitors Communion	Visitors Communion	Communion Totals	Non-visitors Sunday School	Visitors Sunday School	Sunday School Totals	Non-visitors Other 1	Visitors Other 1	Other 1 Tot
▶	2024	163	3	166	157	3	160	41	1	42	0	0	
	2023	163	1	164	159	1	160	92	0	92	0	0	
	2022	164	0	164	159	0	159	35	0	35	0	0	
	2021	194	37	231	190	35	225	40	0	40	0	0	
	2020	191	38	229	191	34	225	43	0	43	0	0	
	2019	192	36	228	192	35	227	38	0	38	0	0	
	2018	190	35	225	190	35	225	38	0	38	0	0	
	2017	183	35	218	119	0	119	38	0	38	0	0	
	2016	180	35	215	122	0	122	38	0	38	0	0	
	2015	175	35	210	132	0	132	33	0	33	0	0	
	2014	172	35	207	122	0	122	30	0	30	0	0	
	2013	167	35	202	115	0	115	26	0	26	0	0	

Export

Print

Save

12

Weekly Attendance

The weekly attendance view will show you attendance totals broken out by attendance type or event, for the group of people you select, over the number of weeks you select, by week. This view is useful for seeing your weekly attendance trends over a time period.

1. To access the "Weekly Attendance" view, open the Attendance module and click on the "Explore" tab.
2. To set what group of people you are running this report for, in the top left corner of the page, you will see the "Who" field, click here to select what group you want to look at this information for.
3. The "Weeks back" and "As of Sunday" fields allow you to set the time frame for this report. "Weeks back" determines how many weeks this view will show, and "As of Sunday" lets you set the date of the Sunday you want to start the report from.
4. The "By attendance" field allows you to set if you want to see your weeks by attendance type (Worship, Communion, Sunday School, etc.) or by event. If you select "Type", you can select which attendance type you want to view in the "Attendance Type" field. If you select "Event", you can select what event you want to view in the "Attendance event" field
5. The graph will show you the number of people who attend each week for the selected Type/Event. Each column represents one week, with the number under the column representing which week of the year it represents.
6. The table below the graph will show details about each week, including which year the week was part of, the number week it was in the year, what date that week started on, the total number of people who attended, and then breaking that number out by non-visitors and visitors.
7. Clicking the "Copy" button will copy the graph to the clipboard so it can be copied into another program. Clicking "Export" will send the table to your spreadsheet program.

Who

Weeks back

As of Sunday

By attendance

Attendance event

Everyone

52

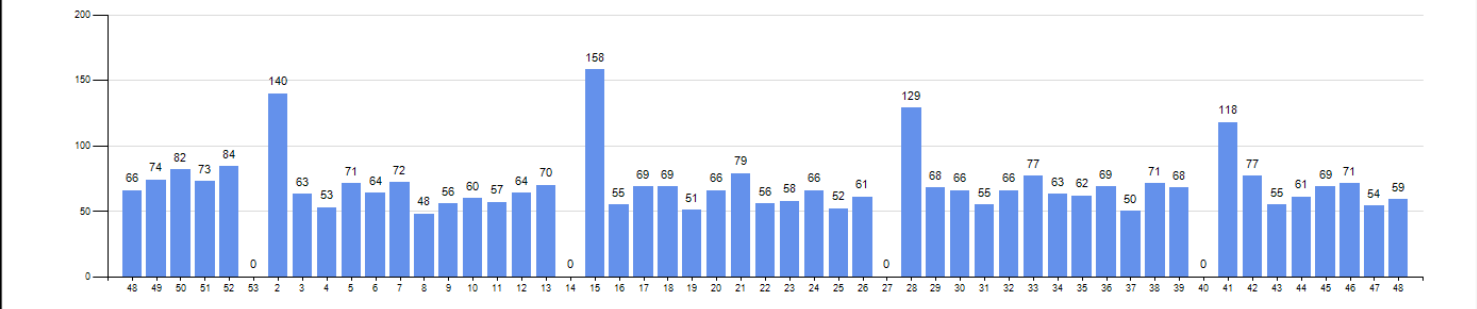
11/24/2024

Event

Contemporary Worship



Contemporary Worship by week for Everyone



	Year	Week	Week starting	Total	Non-visitors	Visitors
►	2024	48	11/24/2024	59	59	0
	2024	47	11/17/2024	54	54	0
	2024	46	11/10/2024	71	71	0
	2024	45	11/3/2024	69	69	0
	2024	44	10/27/2024	61	61	0
	2024	43	10/20/2024	55	55	0
	2024	42	10/13/2024	77	77	0
	2024	41	10/6/2024	118	118	0
	2024	40	9/29/2024	0	0	0
	2024	39	9/22/2024	68	68	0
	2024	38	9/15/2024	71	71	0
	2024	37	9/8/2024	50	50	0
	2024	36	9/1/2024	69	69	0
	2024	35	8/25/2024	62	62	0
	2024	34	8/18/2024	63	63	0
	2024	33	8/11/2024	77	77	0
	2024	32	8/4/2024	66	66	0
	2024	31	7/28/2024	55	55	0
	2024	30	7/21/2024	66	66	0

Monthly Attendance

The monthly attendance view will show you attendance totals broken out by attendance type or event, for the group of people you select, over the number of years you select, by month. This view is useful for seeing your monthly attendance trends, year-over-year.

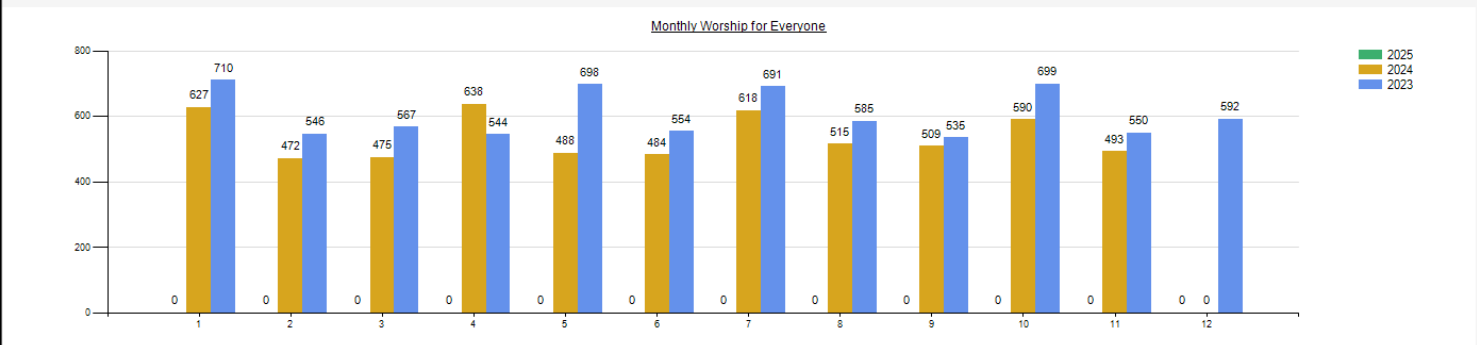
1. To access the "Monthly Attendance" view, open the Attendance module and click on the "Explore" tab and then select the "Monthly Attendance" section on the left side of the screen.
2. To set what group of people you are running this report for, in the top left corner of the page, you will see the "Who" field, click here to select what group you want to look at this information for.
3. The "Years" field will let you set how many years you want to view at once on this view. You can view as few as two years or as many as seven.
4. The "By attendance" field allows you to set if you want to see your weeks by attendance type (Worship, Communion, Sunday School, etc.) or by event. If you select "Type", you can select which attendance type you want to view in the "Attendance Type" field. If you select "Event", you can select what event you want to view in the "Attendance event" field
5. The graph will show you the number of people who attend each month for the selected Type/Event. The graph will show 12 columns, each representing a month of the year, and each year will have its own bar within these columns, as indicated by the legend on the right side of the grid.
6. The table below the graph will show details about each month of each year. You will see the year, the month, and the total number of those who attended, the number of non-visitors who attended and the number of visitors who attended.
7. Clicking the "Copy" button will copy the graph to the clipboard so it can be copied into another program. Clicking "Export" will send the table to your spreadsheet program.

Who
Everyone

Years
3 years

By attendance
Type

Attendance type
Worship



Year	Month	Total	Non-visitors	Visitors
2024	January	627	627	0
2024	February	472	471	1
2024	March	475	475	0
2024	April	638	637	1
2024	May	488	487	1
2024	June	484	484	0
2024	July	618	618	0
2024	August	515	515	0
2024	September	509	509	0
2024	October	590	588	2
2024	November	493	493	0
2024	December	0	0	0
2023	January	710	710	0
2023	February	546	546	0
2023	March	567	566	1
2023	April	544	543	1
2023	May	698	698	0
2023	June	554	554	0

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 view** under the **Explore tab**
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.
5. Use the **Name like** field to search for a particular person

Name like

Subgroup Export Print Save 239

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, go to the **Explore tab** 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 like

 Subgroup
  Export
  Print
  Save

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, click on the **Explore** tab 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.

View Subgroup Export Print Save 2,531

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, click on the **Explore** tab, and select the **By Person/Year** view.
- 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.

50

★

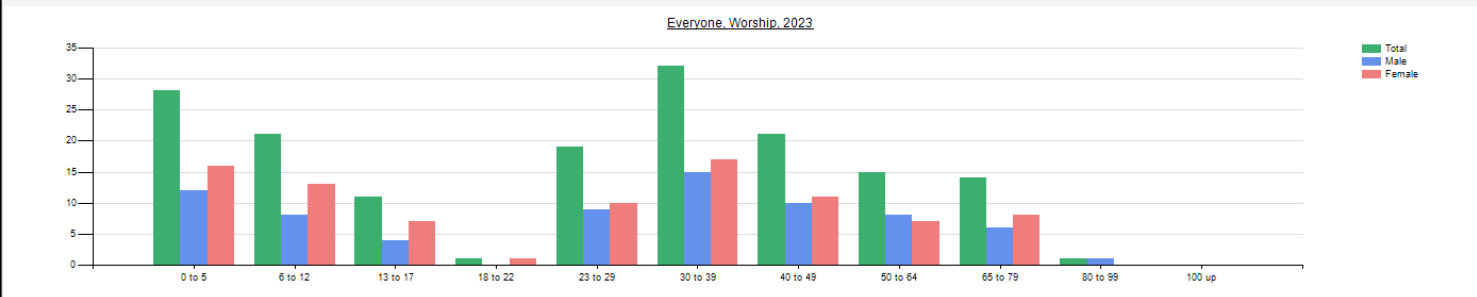
Save

2,531

By Age Group

The By age group view will show you attendance totals broken out by age group, by attendance type or event, over the year you select. This view is helpful in seeing how different age groups attend your church, and how those trends change over time.

1. To access the "By age group" view, open the Attendance module and click on the "Explore" tab and then select the "By age group" section on the left side of the screen.
2. To set what group of people you are running this report for, in the top left corner of the page, you will see the "Who" field, click here to select what group you want to look at this information for.
3. The "Year" field will let you select which year you want to view the statistics for.
4. The "By attendance" field allows you to set if you want to see your weeks by attendance type (Worship, Communion, Sunday School, etc.) or by event. If you select "Type", you can select which attendance type you want to view in the "Attendance Type" field. If you select "Event", you can select what event you want to view in the "Attendance event" field
5. The graph will show you a breakdown of your attendance by age group in 10 different columns. Each of these columns will contain 3 bars of different colors, representing a total, male and female people within this group. The legend on the right side of the graph will identify which column is which.
6. The table below the graph will show the number of people who attended that event/type during the year selected for each age group, as well as median age and those without an age assigned (their birthday field is not filled out in their person record), broken out by male and female.
7. Clicking the "Copy" button will copy the graph to the clipboard so it can be copied into another program. Clicking "Export" will send the table to your spreadsheet program.



	Age group	Total	Male	Female
►	Median age	30	32	27
	No age	1	0	1
	All	164	73	91
	100 up	0	0	0
	80 to 99	1	1	0
	65 to 79	14	6	8
	50 to 64	15	8	7
	40 to 49	21	10	11
	30 to 39	32	15	17
	23 to 29	19	9	10
	18 to 22	1	0	1
	13 to 17	11	4	7
	6 to 12	21	8	13
	0 to 5	28	12	16

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

AttendanceExploreOther ReportsTools / Settings

Reports

Attendance BehaviorAttendance by EventAttendance ComparisonAttendance RosterEvent Summary

→ Go to the Dashboard
→ Go to mailing labels
→ Go to mail merge
→ Go to the Report writer

Attendance Behavior

☐ Use as the report title

Who

(everyone except removed)

Behavior

(any)

Between

5/24/2025

and

8/22/2025

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

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 events attended in the date range, it will also display 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 **Other 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 Behavior

☐ Use as the report title

Who
(everyone except removed) ▾

Behavior
(any) ▾

Between
5/24/2025  and 8/22/2025 

Search by ☒ Types ☐ Events  

☒ Worship



☒ Communion

☒ Sunday School

☒ Other 1

☒ Other 2

Sort / group by
Person ▾

Include  

☐ Current address

☐ Member information

☐ Phone and e-mail

☐ Visit information


☐ Birth, age and sex


☐ Event details


☐ Family information


Font
(Default) ▾

Scale
0 ▾



 Subgroup

 Print

 Save

Attendance by Event Report

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.
- » **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 **Other 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 by Event

☐ Use as the report title

Who

(everyone except removed)

Attendance from

5/24/2025

to

8/22/2025

Search by

☒ Types ☐ Events

☒ Worship

☒ Communion

☒ Sunday School

☒ Other 1

☒ Other 2

Sort / group by

Event

Include

☐ Current address

☐ Member information

☐ Phone and e-mail

☐ Events that did not occur

☐ Birth, age and sex

☐ Family information

Font

(Default)

Scale

0

Print

Save

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 **Horizontal** 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 **Other 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 Comparison

☐ Use as the report title

Who
All attendees

Period
Weekly

Year
2020 to 2025

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

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. Each roster can have a set start date and then be automatically incremented by a set time. 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 grade, Worship, Communion, Other Attendance types, Generic, or a 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 spaces for visitors, and birthdays. If Birthdays are included, the birth dates that fall within the months the report covers, will be **bold** with asterisks (as shown below)

10/24/2022
11:11 am

Christ Community Church
Attendance Roster


D00 Preschool 0



Name	Birthday	Oct 2	Oct 9	Oct 16	Oct 23	Oct 30	Nov 6	Nov 13	Nov 20	Nov 27	Dec 4	Dec 11	Dec 18	Dec 25	Jan 1	Jan 8	Jan 15	Jan 22
Abbott, Jacob	Mar 16	X																
Holdren, Hattie	Jul 14	X																
Hung, Lily	*Oct 16	X																

Visitors

Count: 3



1.																		
2.																		
3.																		
4.																		
5.																		
6.																		
7.																		
8.																		
9.																		
10.																		

Here is how to generate an Attendance Roster Report:

1. Open the Attendance module and select the **Other 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 grade rosters only).
6. Use the check boxes to add any other information you wish to include.
7. Add any additional notes.
8. Click **Print**.

Attendance Roster

☐ Use as the report title

Who

Everyone in Sunday School ▾

Type of roster

Sunday School grade ▾

Start date

8/13/2025



Increment by

Week ▾

Teacher / leader

Format

Group by class ▾

Notes

Include



- | | |
|---|---|
| <input type="checkbox"/> Blanks for visitor names | <input type="checkbox"/> Subgroup or list name |
| <input type="checkbox"/> Birth month and day | <input type="checkbox"/> Those not assigned a grade |
| <input type="checkbox"/> First, M.I., preferred | <input type="checkbox"/> More columns (landscape) |
| <input type="checkbox"/> Phone and e-mail | |

Font

(Default) ▾

Scale

0 ▾



Print



Save

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 **Other 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**.

Event Summary

☐ Use as the report title

Events from

5/24/2025  to 8/22/2025 

Search by ☒ Types ☐ Events




- ☒ Worship
- ☒ Communion
- ☒ Sunday School
- ☒ Other 1
- ☒ Other 2

Include



- ☐ Event notes
- ☐ Visitor notes
- ☐ Attendees

Font (Default) Scale 0 

 Print  Save

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 tab**.
- 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**.

☒ **Define a "visitor"**

When posting attendance, a "visitor" is any non-member with a Participation of one of the following:

☐ Constituent
☒ Friend
☒ Guest
☐ Preparatory
☒ Prospect
☒ Visitor

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 cause these attendance batches to be automatically created. Unchecking the box will prevent them being 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 check 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** tab.
- 2 **Check** the box next to **Other settings**.
- 3 Use the **check box** to select whether to create attendance batches when posting offering batches.

☐ **Other settings**

☐ Create attendance batches when posting offering batches

Save

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

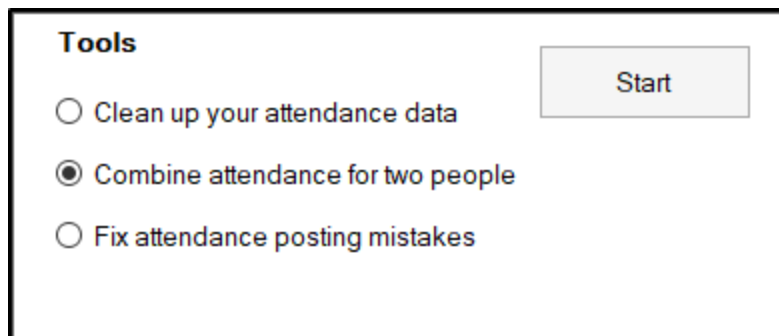
An alternative to this utility is the Combine People utility in the Membership module. This utility combines all membership, attendance, and contribution data and removes the person who was duplicated.

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**.



Tools

☐ Clean up your attendance data

☒ Combine attendance for two people

☐ Fix attendance posting mistakes

Start

- 1 Click **Start**.

- 2 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.
- 3 Click **Continue**.

Combine attendance for 2 people

This utility is used to move the attendance of one person to a second person combining, the records with any existing attendance for that second person.

1.

Step 1: Select the person whose Attendance records you wish to move to someone else.

2.

Step 2: Select the person who is supposed to have these Attendance records.

3.

Step 3: Click 'Continue' to move the attendance from the first person to the second person, combining that attendance with any existing records for the second person.

Continue

Cancel

?

Change Attendance Types

Overview

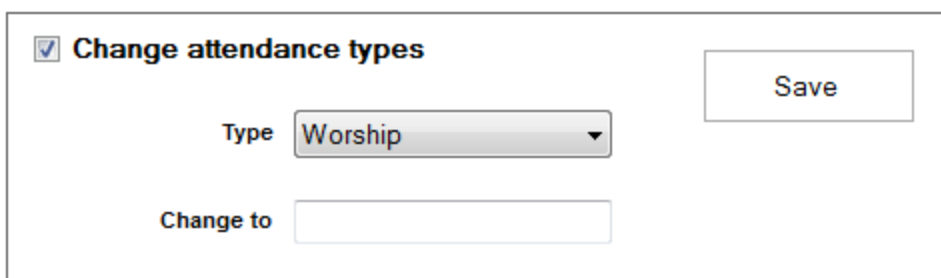
Attendance types allow you to categorize events, which is important for keeping attendance organized. Shepherd's Staff® has three default attendance types available: Worship, Communion, and Sunday School. In addition, you can add two custom attendance types using the **Change Attendance Types** utility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



The screenshot shows a web-based utility titled "Change attendance types" with a checked checkbox. It features a "Type" dropdown menu currently set to "Worship", a "Change to" text input field, and a "Save" button.

<input checked="" type="checkbox"/> Change attendance types	<div>Save</div>
Type <div>Worship ▼</div>	
Change to <div></div>	

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** tab.
- 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.

Continue

Cancel



Mark the checkbox and click "Continue" to permanently delete old attendance detail records.

☐ Delete all attendance detail records before 10/24/2012 (4,641 records)?

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** tab.
- 2 Select **Fix attendance posting mistakes** under **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."

Continue

Cancel

?

	Date ▾	Event	EnteredBy	PostedBy	Count	⬆
▶	10/2/2022	Contemporary Worship	SYSADMIN	SYSADMIN	142	
	10/2/2022	Sunday School	SYSADMIN	SYSADMIN	38	
	9/25/2022	Contemporary Worship	SYSADMIN	SYSADMIN	122	
	9/18/2022	Contemporary Worship	SYSADMIN	SYSADMIN	153	
	9/18/2022	Sunday School	SYSADMIN	SYSADMIN	70	
	9/11/2022	Contemporary Worship	SYSADMIN	SYSADMIN	144	
	9/4/2022	Sunday School	SYSADMIN	SYSADMIN	70	
	8/28/2022	50th Anniversary	SYSADMIN	SYSADMIN	320	
	8/28/2022	Sunday School	SYSADMIN	SYSADMIN	320	
	8/14/2022	Contemporary Worship	SYSADMIN	SYSADMIN	29	
	5/29/2022	Contemporary Worship	SYSADMIN	SYSADMIN	28	
	5/22/2022	Contemporary Worship	SYSADMIN	SYSADMIN	7	
	5/22/2022	Contemporary Worship	SYSADMIN	SYSADMIN	7	
	5/15/2022	Contemporary Worship	SYSADMIN	SYSADMIN	51	
	5/8/2022	Contemporary Worship	SYSADMIN	SYSADMIN	242	



Export

16

Kiosk

The Kiosk lets you set up a device at a location so people who attend events at your church can record their own attendance of that event. This can help your attendance entry person by giving them a head start at recording the attendance of an event, only needing to enter those who attended the event but didn't record their attendance through the kiosk into an attendance batch before posting.

To access the Kiosk on a computer, you will need Shepherd's Staff installed and connected to your Shepherd's Staff database. Log in to Shepherd's Staff, and then go to Attendance, and then click on the "Tools/Settings" tab, and under tools, select the "Start the check-in/kiosk app" and click start. You will be prompted to close Shepherds Staff. After you do, the Kiosk app will open, click the "Kiosk" button to open the Kiosk section:

Note: You must have a kiosk event set up and active in order to record attendance using the kiosk app.



Setting up Kiosk Events

The Check-In application allows you to set up a computer where people enter your church and check themselves in for worship. This program includes the ability to

- Assign any number of events to a kiosk and automate when various events appear on a given kiosk;
- Print name badges at the time the person records attendance.
- Allow visitors to register from within the kiosk, which adds them to the database and records their attendance; and
- Tailor the display of the kiosk, including setting background and foreground colors, the font, and the initial splash screen graphic.

If you plan on using the Shepherd's Staff Kiosk, you will need to set up your events to work with the kiosk.

1. Go to the Attendance Tab in the Attendance module, then select events. Click on the event you want to set up for use in the Kiosk, and then click the "Edit" button
2. Click on the Kiosk Settings tab. You will see a list of available kiosk computers in the Available Kiosks field. These will be listed as the computer names of the computers that are serving as Kiosks. Click on the kiosk you want to adjust on the list. If you need to add a Kiosk, click the Pencil button and the Kiosk Maintenance window will appear:
 - The Kiosks field will show you all available Kiosks. If you want to remove a kiosk from the list, click on it, and then click the "X" button to the right of this field.
 - If you want to add a new Kiosk to the list, type the computer name (if you aren't sure how to find this, click the ? button in this window, and it will provide a short explanation on how to find your computer's name) into the "Name for a new kiosk" field and click the + button.
 - Click "Continue" when finished.
3. First, you can select what time you want the chosen event to appear on the kiosk you selected in the "At this time of day:" section. You can choose Any time, Morning, Evening or Custom time, which will let you select what time the event starts at, and how much time before the start time of the event should this event appear on the kiosk, and how long it should stay on the kiosk after the event starts.
4. The Time period selection section lets you select if the event show show up on a repeating pattern or just on a single date. Selecting the Single Date option lets you pick one particular date in a field that will

appear, but picking a pattern provides specific options on a pattern of what days this event should appear on:

- During these months: A checkbox will appear for each month. Check each month this event should appear in.
- On these weekdays: A checkbox will appear for each day of the week. Check each day of the week this event should appear on.

5. The "For these attendees:" section controls which people will be able to check in using the kiosk. There are 4 options you can select:

- Anyone (recommended) - Anyone will be able to check in using the kiosk
- Enrollees - Only those who are enrolled in the event you selected will be able to check in using the kiosk.
- Current church members - Only those who are current members of your church will be able to check in using the kiosk
- Custom list - This option will let you select a list of people who are listed in a particular Activity, Skill/Spiritual Gift or Training

6. Checking the "Enable Secure Check-in for Enrollees" option will turn on the Secure Check-in Function for this event on the kiosk.

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

☐ Inactive?

☐ Enable Secure Check-in for Enrollees

 Save

Cancel

Note



Enrollees: 59

Kiosk Settings

Available kiosks:

C11-0068
C12-0007
C15-WOOLERYK
C20-BOGARTJ



Time period selection:

- ☒ Pattern
- ☐ Single date

During these months

- | | | |
|-----------------------------------|---------------------------------|------------------------------------|
| <input type="checkbox"/> January | <input type="checkbox"/> May | <input type="checkbox"/> September |
| <input type="checkbox"/> February | <input type="checkbox"/> June | <input type="checkbox"/> October |
| <input type="checkbox"/> March | <input type="checkbox"/> July | <input type="checkbox"/> November |
| <input type="checkbox"/> April | <input type="checkbox"/> August | <input type="checkbox"/> December |

On these weekdays

- | | |
|------------------------------------|-----------------------------------|
| <input type="checkbox"/> Sunday | <input type="checkbox"/> Thursday |
| <input type="checkbox"/> Monday | <input type="checkbox"/> Friday |
| <input type="checkbox"/> Tuesday | <input type="checkbox"/> Saturday |
| <input type="checkbox"/> Wednesday | |

At this time of day:

- ☒ Any time
- ☐ Morning (before 12:00 PM)
- ☐ Evening (after 4:30 PM)
- ☐ Custom time

For these attendees:

- ☒ Anyone (recommended)
- ☐ Enrollees
- ☐ Current church members
- ☐ Custom list

Kiosk Settings

Adjusting the Kiosk Settings can let you customize how your Kiosk looks and operates to best fit your congregation.

1. To access your Kiosk settings, open the Kiosk app through the Attendance module of Shepherd's Staff and then click the "Kiosk Settings" button.
2. You can first adjust the text that displays on the splash screen for your Kiosk in the "Top" and "Bottom" fields. These text fields will appear at the top and bottom of your splash screen respectively.
3. The "Splash screen logo" field will let you upload a picture from your computer to display on your splash screen. Clicking this field will open a file explorer window where you can pick an image from your computer.
4. The Colors section will let you pick the colors used on your splash screen both in general and for your buttons, for both the background and foreground of these items. Click on the item you want to adjust, and you can pick which color you want to use for these items.
5. The Fonts section will let you pick which fonts should be used for General, Data and Buttons. Click in any of these fields to make your font selection
6. The "People can search by" section lets you pick how people can find their name when using the kiosk. There are four options:
 - Either by their name or their phone number - Can search first by a person's name, then their phone number
 - Either by their phone number or their name - Can search first by a person's phone number, and then their name.
 - Name only - Can only pull their name up by searching their name
 - Phone number only - Can only pull their name up by entering their phone number
7. The "Require PIN to close the kiosk Splash screen" allows you to set a PIN that has to be entered in order to close the splash screen. This can prevent someone from accidentally closing the splash screen when they didn't intend to. After you check the box, set the PIN in the "PIN" box and click the Save icon.



Exit



Kiosk



Secure

Splash screen text and font (click text to change)

20250805

Top

Christ Community Church

Bottom

Welcome to our church!

Splash screen logo (click here to change)



Colors (click color to change)

	Background	Foreground
General	<input type="text"/>	<input type="text"/>
Buttons	<input type="text"/>	<input type="text"/>

Fonts (click font to change)

General	Data
<input type="text" value="Trebuchet MS"/>	<input type="text" value="Trebuchet MS"/>
Buttons	
<input type="text" value="Trebuchet MS"/>	

People can search by

- ☒ Either their name or their phone number
- ☐ Either their phone number or their name
- ☐ Name only
- ☐ Phone number only

Options

- ☒ Require PIN to close the kiosk Splash screen

PIN



Kiosk settings



Help

Multi-Purpose Check-In

Shepherd's Staff Check-In is also used for securely checking in children for childcare during a church service and provides verification at pick-up time to make sure the correct person is picking up the correct child.

To access the Multi-Purpose Check-In on one of your Kiosks, open Shepherd's Staff, then Attendance. From there, go to the Tools/Settings tab, and under tools, select "Start the check-in/kiosk app" and click start. This will prompt you to close Shepherd's Staff. After that is done, click the "Secure" button

Some of the features of the Secure Check-In include the following:

- Allowing you to print a name badge and a ticket. The name badge is put on the child, and the ticket is given to the guardian.
- Ability to assign a unique ID number to each child. The ID number prints on both the name badge and the ticket.

The screenshot displays the 'Shepherd's Staff Check-In' application window. On the left is a sidebar with navigation buttons: Exit, Kiosk, Enroll a person, Print name badge & receipt, Check in, Check out, Use barcodes, Kiosk settings, and Help. The main area shows the date 'Friday, August 22, 2025' and a dropdown for 'Secure Events' set to 'Sunday School'. A search bar is labeled 'Search by name or ID (F3)'. Filter options include 'All enrollees' (selected), 'Still here', 'Present', 'Checked out', and 'Not Present'. A 'Show the ID' checkbox is also present. The main table lists children with columns: Present?, Name, Age, SS Grade, Info, Rx, Checked out?, and When. The first row is highlighted in blue.

Present?	Name	Age	SS Grade	Info	Rx	Checked out?	When
<input checked="" type="checkbox"/>	Jacob Abbott	2	D01 Preschool 1	i		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Lacey Abbott	5	K01 Kindergarten	i	Rx	<input type="checkbox"/>	
<input type="checkbox"/>	Darin Belton	6	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Lena Belton	8	S02 Second Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Brandon Carter	11	S04 Fourth Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Michelle Carter	8	S01 First Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Ben Clayton	11	S05 Fifth Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Melissa Clayton	13	S06 Sixth Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Bryan Collins	6	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Kellie Collins	4	D02 Preschool 2	i		<input type="checkbox"/>	
<input type="checkbox"/>	Heidi Culbertson	12	S05 Fifth Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Billy Fox	10	S03 Third Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Emilia Gomez	7	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Toni Gregory	5	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Keith Hall	6	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Nina Henry	6	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Tony Henry	8	S01 First Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Danny Hung	8	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Mila Hunter	6	D04 Preschool 4	i		<input type="checkbox"/>	
<input type="checkbox"/>	Sophie Kessler	6	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Grace Krause	5	D04 Preschool 4	i		<input type="checkbox"/>	
<input type="checkbox"/>	Jessie McNeely	9	S02 Second Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Ben Meier	6	K01 Kindergarten	i		<input type="checkbox"/>	
<input type="checkbox"/>	Charlie Meier	9	S02 Second Grade	i		<input type="checkbox"/>	
<input type="checkbox"/>	Melissa Meier	3	D02 Preschool 2	i		<input type="checkbox"/>	
<input type="checkbox"/>	Aaron Morrison	4	D03 Preschool 3	i		<input type="checkbox"/>	

Count 38


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 on the WebTools Sync button () in the Main Menu of Shepherd's Staff.
- » In the main menu of Shepherd's Staff, click on Tools>WebTools Sync.
- » In either case, from the WebTools manager box, click the link to open WebTools.

 Sync Tools

Register

Synchronize your database with WebTools

Your WebTools link



Sync

Support status: **Active**

Support end date: 12/31/2022



Christ Community Church

Please enter your user ID and password.

User ID:

Password:

Sign In

Support expiration: 12/31/2025

[Need help? Contact us.](#)

Entering Attendance in Webtools

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.

Attendance Batch Entry

Christ Community Church, St. Louis MO
Sign Out

Event: Bible Study
Date: 9/4/2022
People: 2
Save Batch

Type a name and hit enter...
Show Notes

All Members Enrollees Non-members Entry Order Sunday School Grade D00 Preschool 0

Family	Person	Sex	Seq.	SS Grade	V
+	Holdren Holdren, Hattie Marie	F	C	D00 Preschool 0	<input type="checkbox"/>
+	Hung Hung, Lilian (Lily)	F	C	D00 Preschool 0	<input type="checkbox"/>

Type a name and hit enter...

Family	Name	Sex	Seq.	SS Grade	V
Chung	Chung, Lina Caroline	F	C	D00 Preschool 0	<input type="checkbox"/> <input checked="" type="radio"/>
Robinson	Robinson, Nyla Penny	F	C	D00 Preschool 0	<input type="checkbox"/> <input checked="" type="radio"/>

Save Batch
People: 2

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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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	M	H		
	Abbott	Abbott, Jacob Philip	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	M	C	D04 Preschool 4	
	Abbott	Abbott, Lacey Marie	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	F	C	S01 First Grade	
	Abbott	Abbott, Susanne Alice (Sue)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	F	O		
	Alexander	Alexander, David	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	M	H		
	Alexander	Alexander, Shirley J	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	F	S		
	Alexander	Alexander, Jeffrey D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	M	C		
	Alexander	Alexander, Natalie D	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	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.

Statuses

» **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”.

Attendance and Offering Batches

Christ Community Church, St. Louis MO

Sign Out

Attendance Batches

Offering Batches

Hello System Administrator, here are your Attendance Batches:

	Date	Status	Event	People	User	
Open	9/4/2022	Ready	Bible Study	2	SYSADMIN	

Add a Batch

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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 Batches from WebTools

Deselect any batches you don't want to import.

Download	Batch ID	Event	User ID	Message
<input checked="" type="checkbox"/> 1	66	Bible Study	SYSADMIN	

Import

Close