Getting Started - Attendance

The CDM+ Attendance program is designed to assist you in recording and evaluating the participation of people in the life of your church. Attendance at committee, council, board, fellowship meetings, worship services, Christian education classes, annual congregational meetings, retreats, or any other type of event can be recorded in CDM+. Recording attendance in CDM+ requires you do two things: acquire the names of those present at a particular service or event, and enter attendance for that particular service or event.

In order to begin tracking attendance in CDM+, you must have the following items in place:

- Individual Records must be entered.
- Master Codes for Services/Events, Church (Sunday) School Classes, and other groups or lists must be identified and entered.
- Membership Status codes should be set up for control of Attendance Lists.

Setting up Class and Group Lists

In order to begin tracking attendance for a class, you must have the classes defined in the Master Coding System and individuals enrolled in the classes. To establish classes follow these steps:

▶**File** ▶**Master Coding System** ▶**Codes**
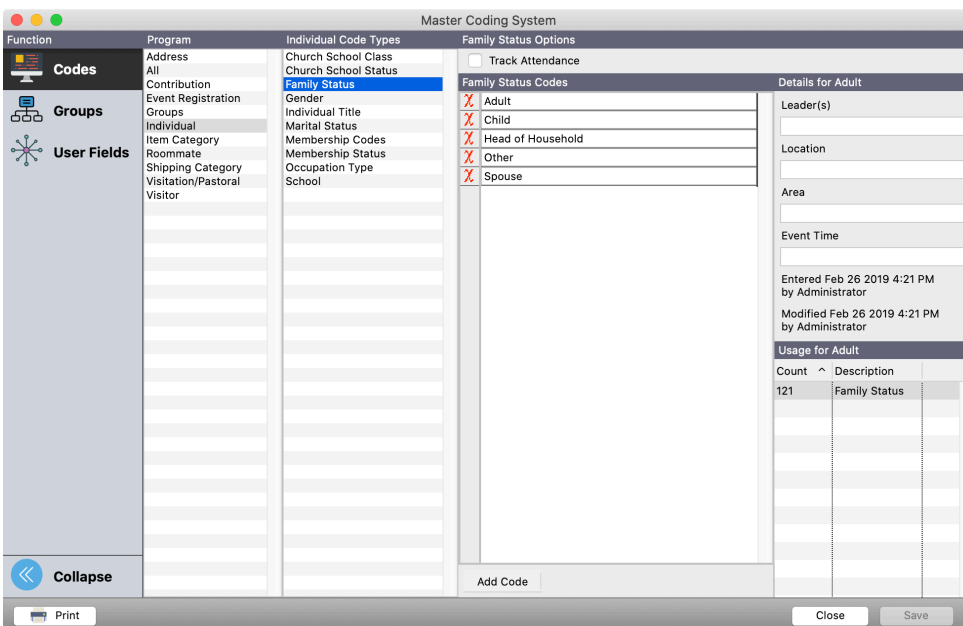
With the Codes tab highlighted, click once to select Individual under the Program column. This will provide a list of the Individual Code Types in the column to the right. In this column select 'Sunday School Class.' To add a class, click the small Add Code button at the bottom of the column to the right called 'Sunday School Class Codes'. Type the description for the class in the new line. You may identify a leader, location, area, and time, if desired. To add additional classes, either click the Add button or press the tab key while your cursor is in the class description field to create a new line.

Once you have your classes defined and individuals entered in CDM+, you can assign individuals to classes. Assigning individuals to classes is done through the Individual List Maintenance window.

Assign Individuals to Classes
▶Program ▶Membership ▶Individual List Maintenance

The list on the left is all the individuals you have entered in CDM+. On the right, choose the code type and code (or class) for the class in which you want to enroll individuals. You can add individuals to a class by any of three methods:

• Selecting a name in the left hand column and dragging it to the right hand column

• Double-clicking a name in the left hand column

• Selecting a name and clicking Transfer Selected button
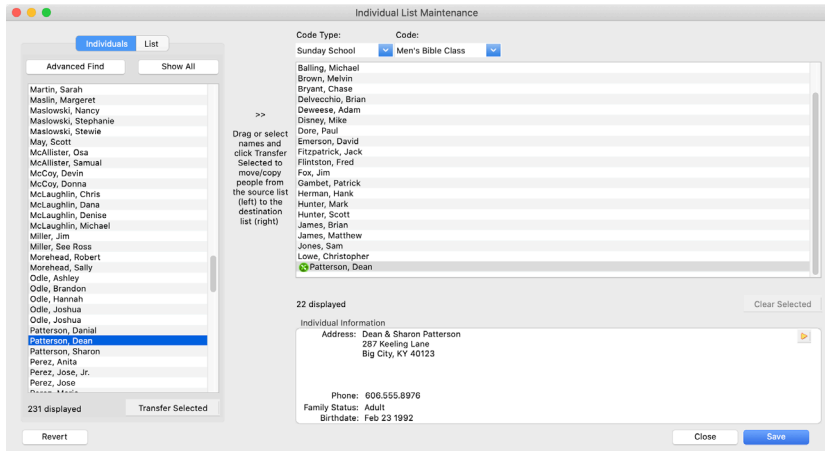
Shift-click to select a series of multiple names in the left-hand panel or control-click to choose several names at once. When the names are selected, drag them to the right-hand panel or click the Transfer Selected button.

The Individual List Maintenance can also be used to move individuals from one class to another. This is an excellent way to perform promotions. Click on the List tab on the left hand side of the window and select the Code Type and Code for a particular class. On the right, select another Code (or class) and move the individuals from the left to the right as described above.
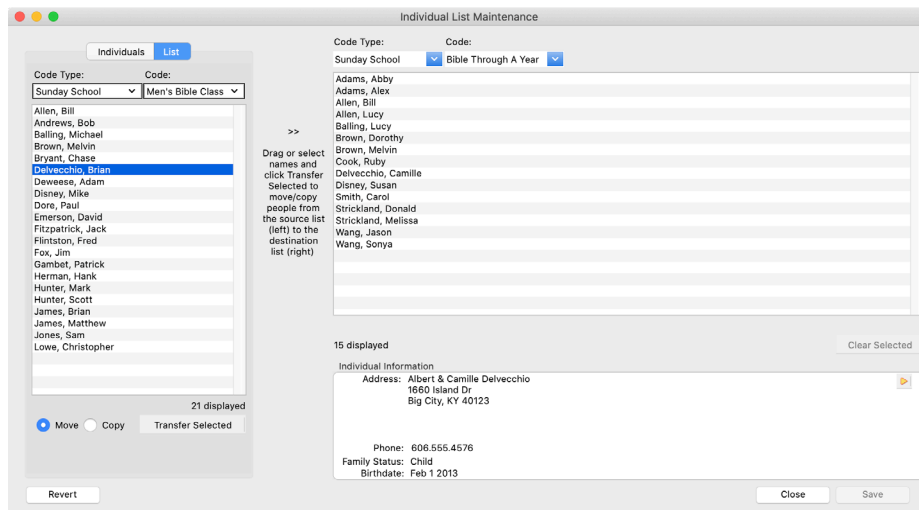

Note the Address record information for the individual displays when selected. This is helpful to insure the selection of the proper individual.

Attendance Preferences

Prior to entering attendance in CDM+, it is helpful to establish the status codes you would like to see when entering data. You set this in CDM+ Preferences.

▶ **CDM+(Mac)/File(Windows)** ▶**Preferences** ▶**CDM+ System** ▶**Membership and Attendance** ▶**Attendance**
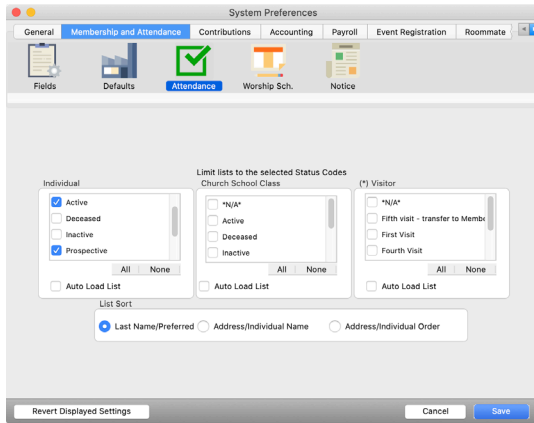
Here, you can set the status codes for Individuals (Events, Services, etc) and Classes. You can also tell CDM+ to load the class enrollment (based on Status Codes chosen) into the right-hand panel of the Attendance Entry windows by clicking on the **Auto Load List** checkbox. When finished, click Save.

Taking Attendance

Taking attendance requires that you have the names of those present at the service, class or event. For this, CDM+ has Worksheets for marking attendance prior to inputting it. There are three Worksheets from which to choose:

- Attendance Worksheet by Date
- Attendance Worksheet
- Barcode Worksheet

In addition to attendance worksheets, you can use the CDM+ Mobile app to take attendance. The beauty of using the app is that once you "take" attendance, it is automatically entered in CDM+/

Attendance Worksheet By Date

▶**Reports** ▶**Attendance Reports** ▶**Worksheets** ▶**Attendance Worksheet By Date**
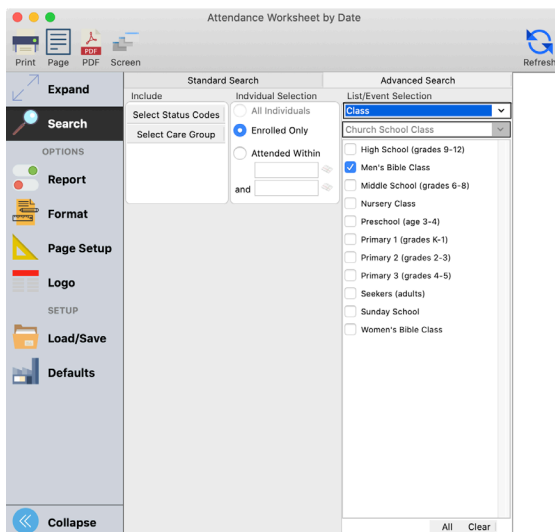
The people and classes (or events) are defined in the middle section and the items on the report and its formats are set from items under Options in the sidebar.

Under "Include" you select the Status Codes (e.g., Active, Inactive, etc.) and/or Care Groups. Under "Individual Selection," you can further define who is on the list by a range of dates an individual has attended, such as only the people who have attended this year. For example, anyone who has not attended between January 1, 2019 and September 30, 2018 would not show up on the worksheet. Under "List/Event Selection," you select the classes or events to be printed on the worksheet. If multiple classes/events are selected, each will print on a separate page or pages.

With the upper part of the window complete, move to the bottom portion of the window. The first tab is the "Report" tab. Choose the dates you want on the worksheet by clicking the Choose button.

For example, to setup a worksheet for each Sunday in the month of September, you select "Sunday" and place a "1" in the box above "Sunday." Enter the first and last Sundays in the date boxes at the bottom of the window. The weekly dates are displayed in the box to the right. When finished, click OK. When you have these parameters set, you are ready to print.
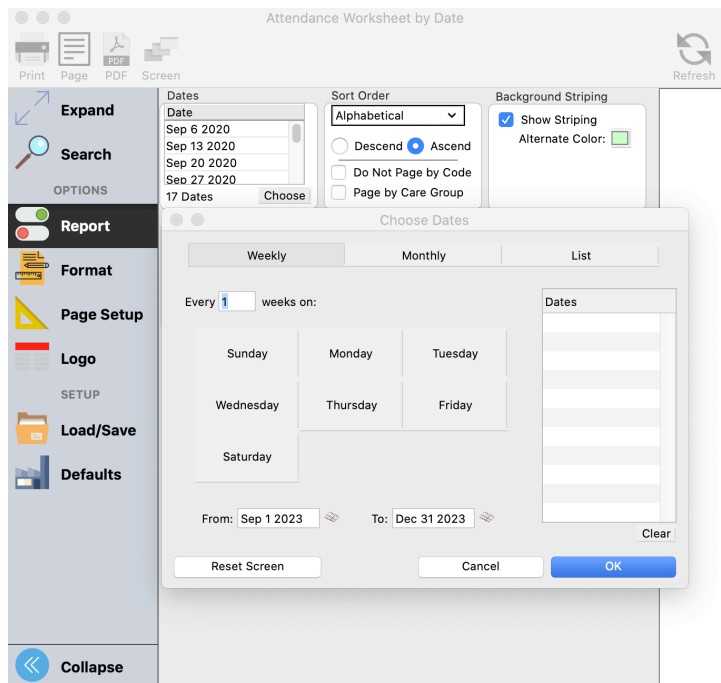
Sample Attendance Worksheet By Date
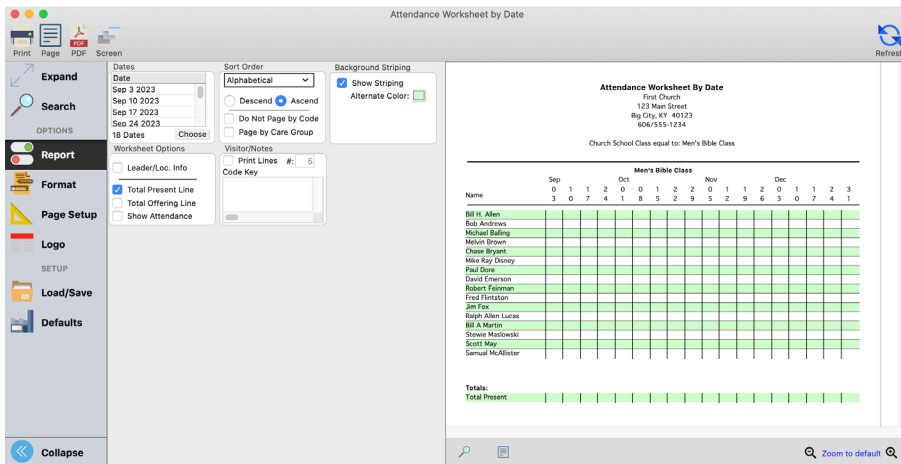
The Worksheet lists names alphabetically down the page. As seen on this example, you can choose to add a Notes area, as well as a Totals area, to the bottom of the Worksheet.

Barcode Worksheet

The Barcode Worksheet is an alternative to the regular worksheets, printing a barcode beside each name which you scan with a barcode reader. For information regarding CDM+ compatible barcode readers, please contact the **CDM+ Sales Department** at **(877-891-4236)**.

▶**Reports** ▶**Attendance Reports** ▶**Worksheets** ▶**Barcode Worksheet**

As before, you can select the Membership Status, Care Groups, the Event, Class, or Service. You can print the worksheets for a particular date range as well as sort and page the information according to your needs.

For ease in finding individuals on a long list, click on the Format tab and choose to print Last Name First and Last Name Bold.
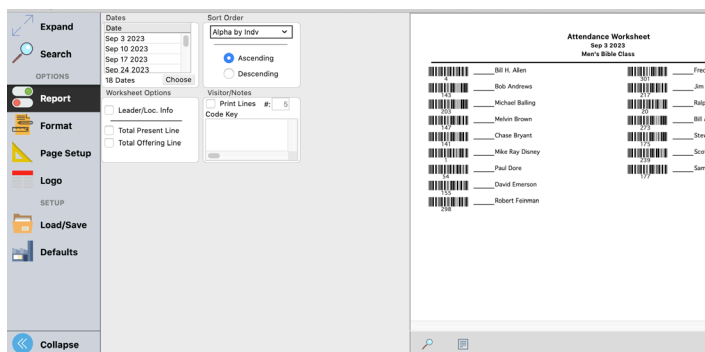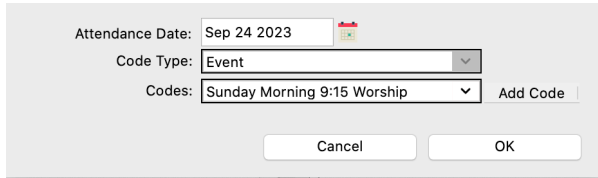

Entering Attendance for a Service or Event
▶**Program** ▶**Attendance** ▶**Event Attendance**
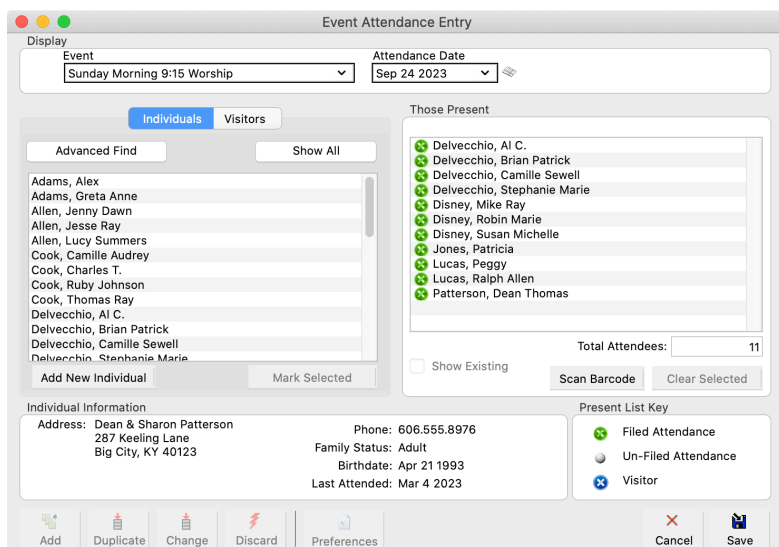
To begin entering attendance data, you click the Add button at the bottom left of the window.

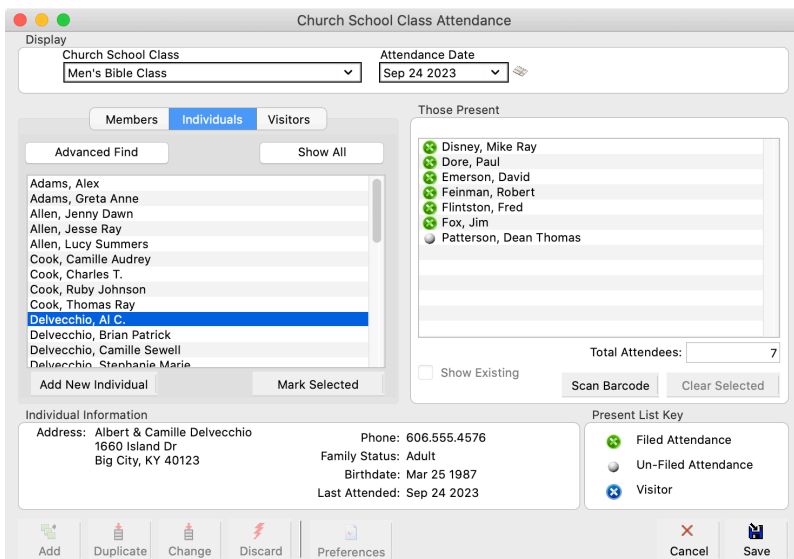On the pop-up window, enter the date of the event and choose the Code Type and Codes. Click OK.

Using the Attendance Entry window is similar to the Individual List Maintenance. To mark an individual as attending a particular event, move the name from the left to the right. Refer to the Assign Individuals to Classes section above for instructions.

While you are actively moving names from the left to the right, the dot beside the name on the right will be gray. After saving the entries, the dot will turn green signifying that the attendance was saved. A blue dot indicates that a person is a visitor.

A barcode reader, in conjunction with a Barcode Worksheet, may be used to enter attendance. Click the *Scan Barcode* button at the bottom of the right-hand panel and scan the appropriate barcodes.

Entering Attendance for a Class
▶**Program** ▶**Attendance** ▶**Class Attendance**

Click the Add button and select the class and date. Move names of those present to the right as previously described. When finished, click Save.

NOTE: If you set your System Preferences to Auto-Load class members, those enrolled in the class will display as present automatically. To mark attendance with Auto-Load selected, you will *remove people who were not present* by double-clicking the name or by selecting multiple names and clicking the Clear Selected button at the bottom of the window.

Using a Barcode Reader to Enter Attendance

After you select an Attendance Date and Class Code, click the *Scan Barcode* button at the bottom of the right-hand panel (see below). Then use the Barcode reader to scan the appropriate barcodes. If you have class members' names auto-load, remember you are scanning the barcodes of those persons NOT present.

NOTE: To enter attendance using a barcode reader, you must use the Barcode Worksheet to mark attendance.

Setting Up Attendance Taking on a Tablet or Phone

### Set Up Attendance Taking – tablet app
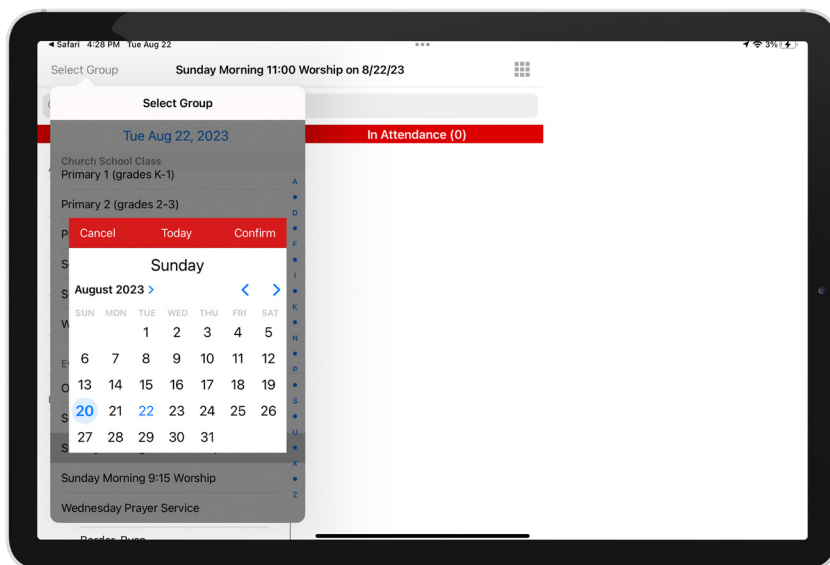
Begin by selecting the **Date** (note that it will default to today's date), then tap to select the group from the list below. This can be a group, class or event. CDM+ Mobile will display any that you specified in CDM+ can track attendance.

If you tap on a class or group, only the persons who are members of that group will appear in the list of Individuals.

If you tap an event, such as Sunday Morning Worship, the list will display all Individuals in your CDM+ Membership database.

Set Up Attendance Taking – phone app
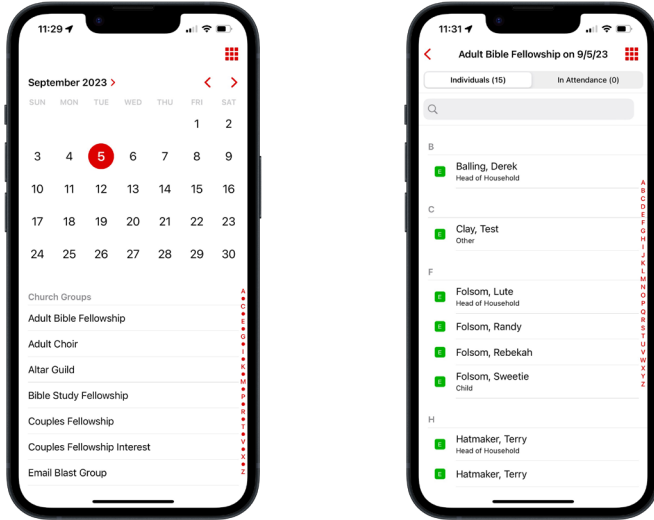
To accommodate the smaller screen, Attendance setup requires a second window in the phone app. Select the **Date**, then tap the **Group** button to open the **Select Group** screen and select the group.

Once you have selected a group, the app will return to the Setup screen with the group selected. Tap **Mark Attendance** to begin taking attendance.

Using CDM+ Mobile to Enter Attendance

To take attendance, tap a name in the Individuals list to move it to the In Attendance list. If you make a mistake simply tap the name in the In Attendance list to move it back to the Individuals list.
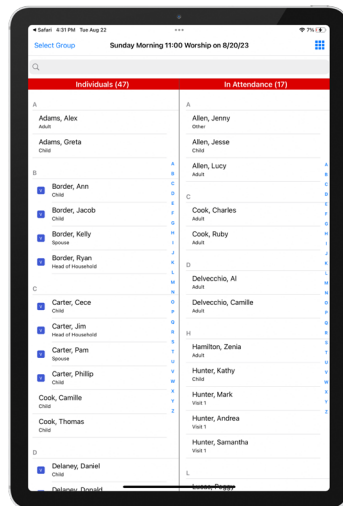
To search for an Individual by name, tap the search bar, enter a name, and the device will display all Individuals that match that search. This is useful to mark attendance of visitors or individuals who are not listed as members of a group. Members of a group will be marked with a green 'E'; visitors will have a blue 'V' next to their names.

To search for an Individual by name, tap the search bar, enter a name, and the device will display all Individuals that match that search. This is useful to mark attendance of visitors or individuals who are not listed as members of a group. Members of a group will be marked with a green 'E'; visitors will have a blue 'V' next to their names.

Unlike in the tablet app that displays the Individuals and In Attendance lists side-by-side, you must tap buttons to switch your view of the lists when using the phone app.

NOTE: Marking attendance on one device does not immediately update the screen on any other device taking

attendance for the same event on the same day. However, the attendance is still saved live to the database, and reloading the attendance list on other devices will show a current list of those marked for attendance and those not in attendance.

Barcode Attendance app

NOTE: This app is not available on devices that do not have a camera.

Tap the Barcode Attendance icon on the launcher page to open the Barcode Attendance app. The setup page will open and allow you to change the attendance date by tapping the **Change** button.

Select a group to start the scanner. The scanner will scan for Individual barcode. You can print name tags that include Attendance Barcodes using the Individual Name Badges report in CDM+ Membership. If CDM+ Mobile finds a valid barcode, it will mark that individual for attendance. Otherwise it will display an error.
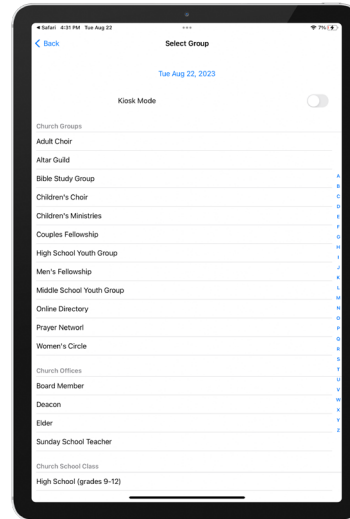
If your device has both front and back cameras, you can tap the **Flip** button in the bottom right corner to switch between the cameras.

You can set the barcode attendance scanner to **Kiosk** mode on the Barcode Attendance setup page. Kiosk mode will require you to enter your PIN to exit the Barcode Attendance app, or to Flip the camera.

Barcode Attendance in CDM+ Mobile scans the same barcodes as the Barcode Attendance Worksheet.

Update Attendance History and View
▶Program ▶Attendance ▶Update Attendance History

The Update Attendance History updates the attendance information displayed on the Attendance tab of the Individual Record.

Enter the Current Period and History Period date ranges. Click Update, and if you are sure you want to do this, click Yes. **NOTE:** This only affects Event Attendance.

After running the Update Attendance History function, you can view the updated information on the Individual Record. This function can be run at any time, for example, after you discover a missing record for attendance and add it to last year's attendance records for completion sake. You must run the Update Attendance History function in order for it to display correctly on the Individual Record.
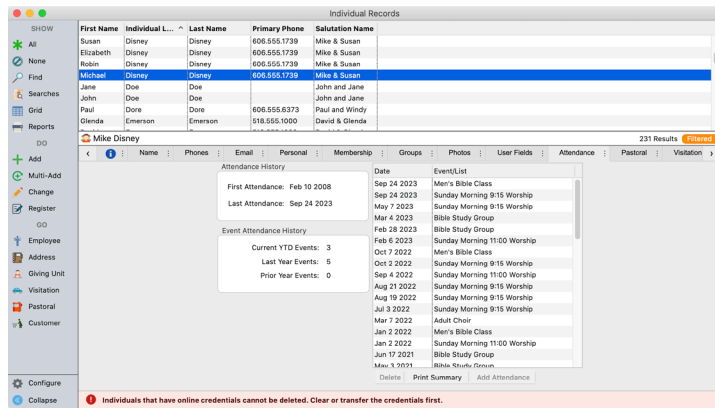
Attendance Promotion

▶Program ▶Membership ▶Individual List Maintenance

The Individual List Maintenance can be used to move individuals from one class to another. This is an excellent way to perform promotions. Click on the List tab on the left to open a pop-up window where you select the Code Type and Code for a particular class. On the right hand side, select another Code and then move the individuals from the left to the right as described above.
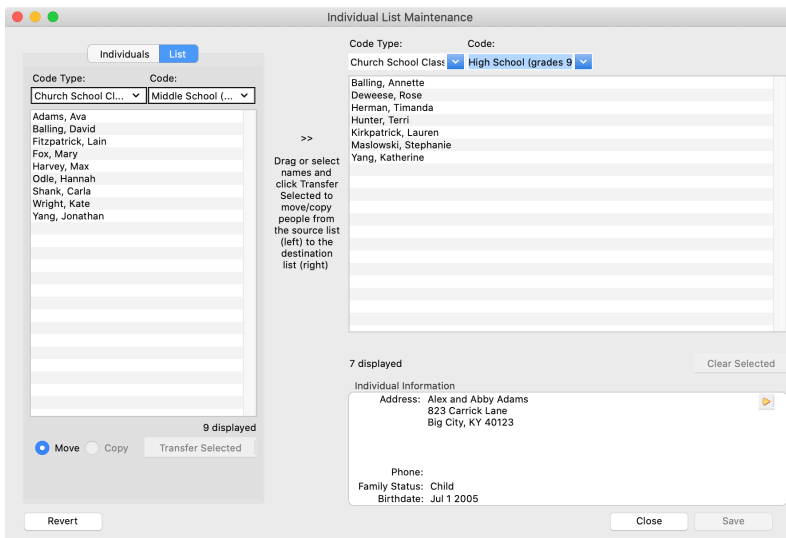
If classes are age-graded, start with the oldest age to be promoted. Example: Move 12th Grade to next class; then 11th grade into 12th; 10th grade into 11th; etc.