CDM Plus Attendance

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Attendance

Adding Attendance Records for a Service or Event

NOTE 3.1: **Service/Event Codes** must be created through the **Master Coding System** before attendance can be recorded and tracked (See **Appendix A**). Also see **Master Coding System Tip 4** in **Appendix A** for recommended **Service/Event Codes**.

Recording attendance in CDM Plus requires you do two things: 1) acquire the names of those present at a particular service or event; 2) enter attendance for that particular service or event.

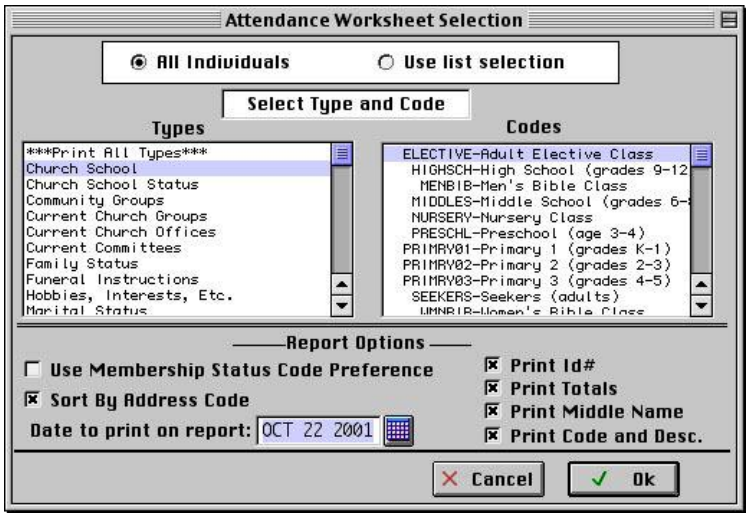
Creating a Worksheet to Help in Entering Names for a Service or Event

1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Reports** select **Worksheet** or, if you are using the optional barcode wand reader (pen scanner), select **Barcode Worksheet.**

For information on purchasing the barcode wand reader, contact the CDM+ sales office at 877-8891-4236.

3- Turn on the radio button beside **All Individuals** and turn off **Use Membership Status Code Preference** checkbox. It is wise to turn on the checkboxes beside **Sort By Address Code** and **Print Middle Name**.



NOTE 3.2: The **Sort By Address Code** and **Print Middle Name** checkboxes may be set to come on automatically by choosing **Preferences/Settings** under **Setup** on the **File** menu. You may also limit the people who appear on the worksheet through the use of **Status Codes** on the **Preferences/Settings** window under **Setup** on the **File** menu.

4- Click on the Calendar button beside the Date field, and select the date you want printed on the report. You may also enter the date manually.

5- Press **Return/Enter** or click **OK.**

6- Select **Printer** on the **Set Report Destination** screen.

7- Press **Return/Enter** or click **OK** and the attendance worksheet will be printed.

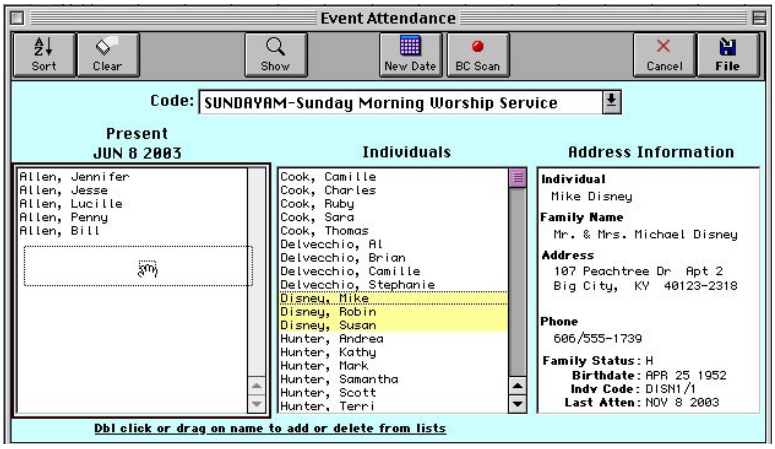
8- Using attendance registers, cards, or whatever method is used in your setting to record attendance, highlight the names on the worksheet of those present for the particular service/event.

9- You are now ready to move to the next section, **Entering Attendance for a Particular Service/Event for a Particular Date**.

Entering Attendance for a Particular Service/Event for a Particular Date

1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Attendance** on the menu bar, select **Multiple Event Attendance** or click the **Multiple Event Attendance** icon on the Tool Bar. The **Event Codes** list will appear. Double-click the event for which you wish to record attendance.



3- Enter the attendance date you wish to record. You may record the date manually or by using the calendar button,

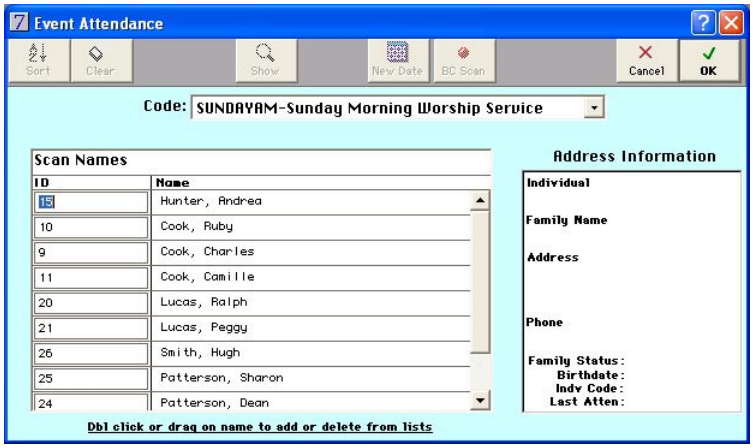
4- Press **Return/Enter** or click **OK**. Individual names will load into the **Members** window in the middle. Address information appears to the right to help differentiate between more than one person with the same name.

5- Double-click on the names of persons present at the service/event for the particular date. This will move them to the **Present** window on the left.

NOTE 3.3: You may click and drag across multiple names at one time to select them all, or you may press CTRL-click (⌘-click on a Macintosh) to select non-contiguous names. Then a click and slight pause on the selected names will turn the pointer into a hand, at which point you can drag the entire selection to the **Present** window. Pressing **Return/Enter** will also move the highlighted name over.

6- Or use barcode scanning wand and **Barcode Worksheet** to enter attendance.

7- Attach a barcode wand reader (pen scanner) to your computer.



8- Click on the **Barcode Scan** button at the top of the Event Attendance window. Swipe the pen scanner across the barcodes next to the names you have highlighted on the **Barcode Worksheet** to mark those persons present.

9- Click **OK** when finished scanning.

10- Click on the **File** button. A dialog box will appear asking if you wish to file the attendance for this date.

11- Press **Return/Enter** or click **Yes**. Attendance records will be updated.

12- You may insert another attendance date by clicking the **New Date** button . Enter the new date, either manually or using the calendar button, and press **Return/Enter** or click **OK**. You may work with the same present list or click the **Clear** button to clear out those in the present list and start over. You may also choose another event by clicking on the **Code** list pull-down and selecting a new event.

Adding Attendance Records for Church School Classes

NOTE 3.4: Church School Class codes must be created through the **Master Coding System** before attendance can be recorded and tracked (See **Appendix A**). Also see **Master Coding System Tip 5** in **Appendix A** for recommended Church School codes and **Adding individuals to Church School Classes through Individual Maintenance** in **Appendix B**.

Recording attendance requires you do two things: 1) acquire the names of those present at a particular class; 2) enter attendance for that class.

Creating a Worksheet to Help in Entering Names for a Class

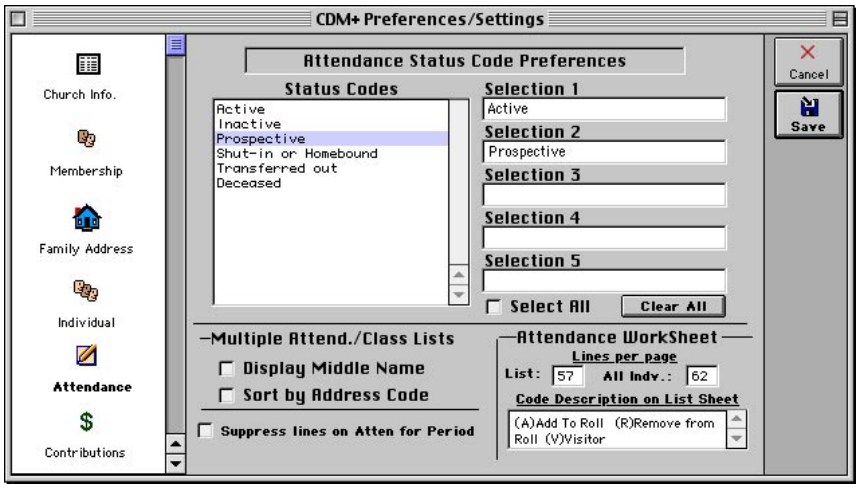
1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Reports** select **Worksheet** or, if you are using the optional barcode wand reader (pen scanner), select **Barcode Worksheet.**

For information on a barcode wand reader, contact the CDM+ sales office: 877-8891-4236.

3- Select the **Use list selection** radio button at the top of the screen, select **Church School** under Types and ****Print All Codes**** under Codes. Turn off the **Use Membership Status Code Preference** checkbox. It is wise to turn on the checkboxes beside **Sort By Address Code** and **Print Middle Name**.

NOTE 3.5: The **Sort By Address Code** and **Print Middle Name** checkboxes may be set to come on automatically by going to **Setup** under **File**, choosing **Preferences/ Settings** and clicking on **Attendance** from the choices on the left.You may also limit the people who appear on the worksheet through the use of **Status Codes** in the **Preferences/Settings** for **Attendance**.



4- Press **Return/Enter** or click **OK.**

5- Select **Printer** on the **Set Report Destination** screen.

6- Press **Return/Enter** or click **OK.**

7- Send report to the printer and attendance worksheets will be printed.

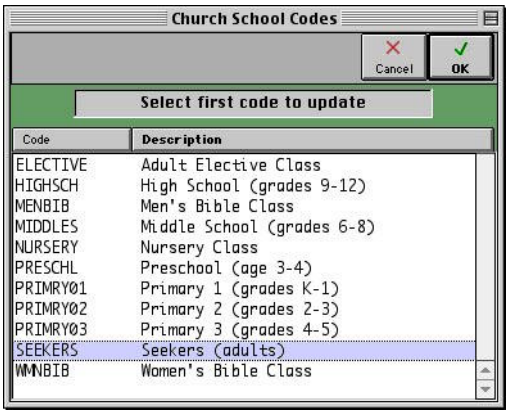
8- Distribute these attendance worksheets to the church school classes and have someone in each class highlight or mark the names of those present in each class.

9- Now move to **Entering Attendance for a particular Church School Class for a particular date**.

Entering Attendance for a particular Church School Class for a particular date

1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Attendance** on the menu bar, select **Multiple Class Attendance** or click the **Multiple Class** icon on the tool bar. A **Church School Codes** list will appear in a pop-up window.

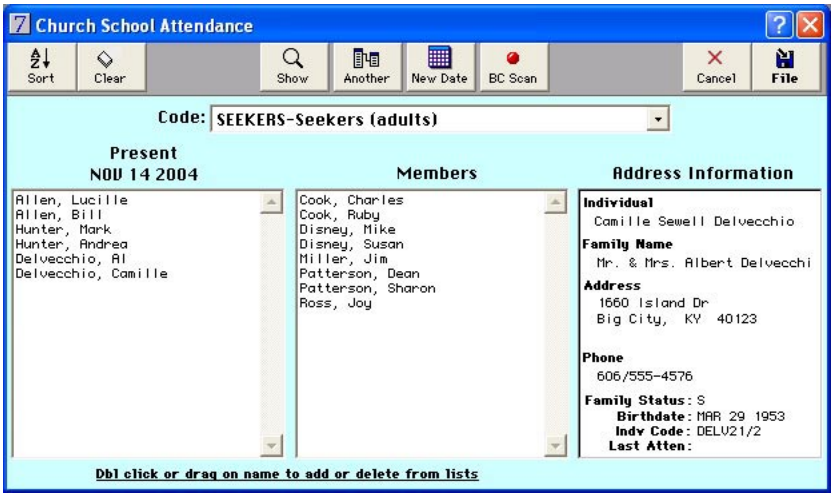


3- Double-click on the class for which you wish to enter attendance.

4- Enter the attendance date you wish to record. You may do this manually or by using the calendar button.

5- Press **Return/Enter** or click **OK**. Individual names of class members will load into the **Members** window on the right.

6- Double-click on the names of persons present in the class for the particular date, moving them to the **Present** window on the left (see **NOTE 3:3** above).



NOTE 3.6: If more were present than absent, you may click and drag across all the names selecting the entire class and then move the entire class to the **Present** window. Then double-click to move the ones who were absent back to the right.

6- Or use barcode scanning wand and **Barcode Worksheet** to enter attendance.

7- Attach a barcode wand reader (pen scanner) to your computer.

For information on a barcode wand reader, contact the CDM+ sales office: 877-8891-4236.

8- Click on the **Barcode Scan** button BC Scan at the top of the Church School Attendance window. Swipe the pen scanner across the barcodes next to the names you have highlighted on the **Barcode Worksheet** to mark those persons present.

9- Click **OK** when finished scanning.

7- Click on the **File** button. A dialog box appears asking if you wish to file the attendance for this date.

8- Press **Return/Enter** or click **Yes**. Attendance records will be updated.

9- You may insert attendance for another class by clicking the **Another** button.

10- Double-click **Church School** on the **Select List** window.

11- Double-click the class for which you wish to record attendance.

12- Enter the attendance date (manually or by using the calendar button) and press **Return/Enter** or click **OK**. Now return to step 6 above and enter attendance for this new class. Continue until attendance for all classes has been entered.

NOTE 3.7: Attendance for **Groups**, **Committees**, or any other list may be recorded in the same way as Classes. Instead of selecting **Multiple Class Attendance,** simply select **Multiple List Attendance** under **Attendance** on the menu bar and follow the above steps.

Attendance Reports

Two of the most common reports generated out of Attendance are **Missing Report-Select** and **Attendance For Period**. Following are instructions for printing these two reports.

Missing Report-Select

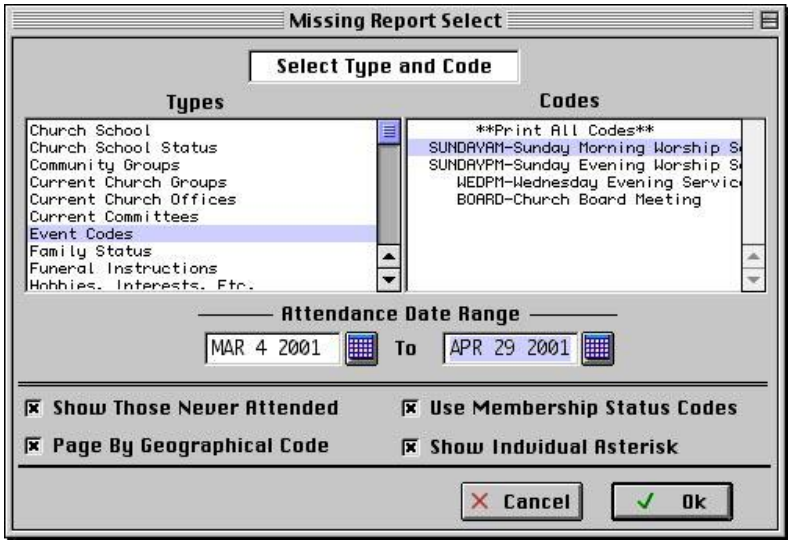
1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Reports,** select **Missing Report-Select.**

3- Under **Types,** select **Church School, Event Codes**, or any other list for which you want a missing report.

4- Under **Codes,** select the particular Church School class, Event, or other list choice for which you want a missing report. You may select ****Print All Codes**** to get a missing report on all the choices.

5- Enter the beginning date of the date range for the missing report. You may enter the date manually or use the calender button to choose the date.



6- Click on the calendar button beside the ending date of the date range and choose the ending date, or press the **Tab** key and enter the ending date manually. If you are doing a report for one day, put the same date in both beginning and ending date range fields.

7- Press the **Tab** key to make sure the ending date is accepted correctly.

8- Turn off the **Use Membership Status Codes** checkbox, if it is on. (If you wish to limit the people who are considered for this report through the use of status codes, you may do so through **Preferences/ Settings** for **Attendance,** found under **Setup** on the **File** menu.)

NOTE 3.8: Turn on the checkbox by **Show Those Never Attended** if you wish to include persons on the missing report who have no attendance records in the system yet. Turn on the checkbox beside **Show Individual Asterisk** if you wish those with a **Yes** in the **Asterisk** field on their individual record to have an asterisk beside their name on this report. Turn on the checkbox beside **Page By Geographical Code** if you wish to sort the report by the first code in the **Geographical Codes** field on the **Family Address Record** and print a separate sheet for each different code. If the first **Geographical Code** is the Shepherd Group code, each Shepherd Group leader will get a separate sheet with the names of members of their group who have missed. See **NOTE 2.6** and **Master Coding System Tip 2** in **Appendix A**.

9- Press **Return/Enter** or click **OK.**

10- **Select Report Format** screen will appear. Select the type of report you prefer at this time. You will have the option to print additional reports for these same persons later. (e.g.—print a standard list of those missing first; then print a personalized card to these persons; then print labels to go on the cards).

11- Press **Return/Enter** or click **OK.**

12- Select **Printer** on the **Set Report Destination** screen.

13- Press **Return/Enter** or click **OK.**

14- Send report to the printer and report will be printed.

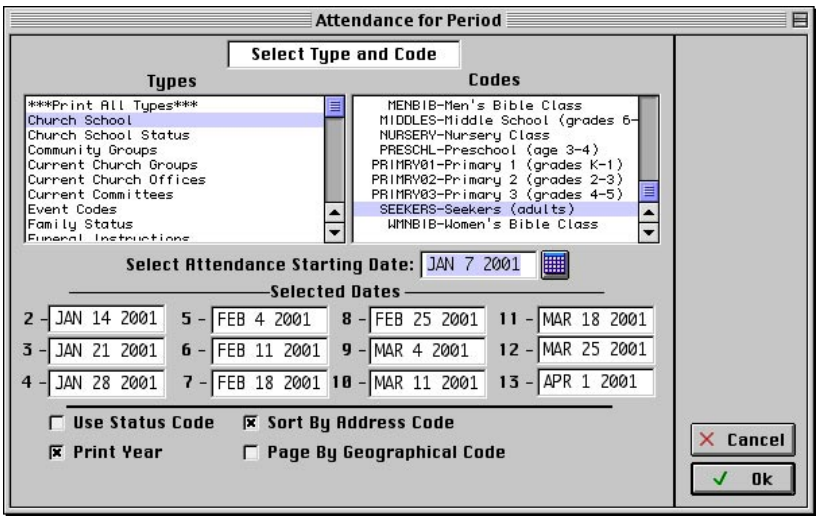
15- CDM Plus will ask if you wish to **Print Another Report?** and you may return to step 11 and choose another report format option.

This report includes the names of persons who missed the particular event during the date range specified.

Attendance For Period

1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Reports,** select **Attendance For Period.**



3- Under **Types**, select **Church School, Event Codes**, or any other list for which you want an attendance for period report.

4- Under **Codes** select the particular Church School class, Event, or other list choice for which you want an attendance for period report. You may select ****Print All Codes**** to get an attendance report on all the choices.

5- Enter the beginning date of the date range for the attendance by period report in the **Select Attendance Starting Date** field. You may enter the date manually or use the calendar button to select a date.

6- Press the **Tab** key. The next 12 weeks will fill in automatically in fields 2 - 13, but you may change these dates to any others you choose.

7- Turn off the **Use Status Code** checkbox, if it is on. (If you wish to limit the people who are considered for this report through the use of status codes, you may do so through **Preferences/Settings** under Setup on the File menu.)

NOTE 3.9: Turn on the **Sort by Address Codes** checkbox to print family members together and turn on the **Print Year** checkbox if you wish the year to print on the reports and not just the month and day. Turn on the **Page By Geographical Code** checkbox to sort the report by the first code in the **Geographical Codes** field on the **Family Address Record** and print a separate sheet for each different code. If the first Geographical Code is the Shepherd Group code, each Shepherd Group leader will get a separate sheet with the names of members of their group who have missed. See **NOTE 2.6** and **Master Coding System Tip 2** in **Appendix A**.

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Attendance Report By Period
Seekers (adults)
January 7, 2001 To April 1, 2001
Sherpherd Group 1 - Name of leader

Name:	01/07/01	01/14/01	01/21/01	01/28/01	02/04/01	02/11/01	02/18/01	02/25/01	03/04/01	03/11/01	03/18/01	03/25/01	04/01/01
Dean Patterson		X	X	X	X	X		X		X	X	X	
Sharon Patterson		X	X	X	X	X		X		X	X	X	

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Attendance Report By Period
Seekers (adults)
January 7, 2001 To April 1, 2001
Sherpherd Group 2 - Name of leader

Name:	01/07/01	01/14/01	01/21/01	01/28/01	02/04/01	02/11/01	02/18/01	02/25/01	03/04/01	03/11/01	03/18/01	03/25/01	04/01/01
Charles Cook				X	X	X	X	X			X	X	
Ruby Cook				X	X	X	X	X			X	X	
Mike Disney			X	X	X	X		X		X	X	X	
Susan Disney			X	X	X	X		X		X	X	X	
Andrea Hunter		X	X	X		X	X	X		X	X		
Mark Hunter		X	X	X		X	X	X		X	X		

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Attendance Report By Period
Seekers (adults)
January 7, 2001 To April 1, 2001
Sherpherd Group 3 - Name of leader

Name:	01/07/01	01/14/01	01/21/01	01/28/01	02/04/01	02/11/01	02/18/01	02/25/01	03/04/01	03/11/01	03/18/01	03/25/01	04/01/01
Lucille Allen			X	X		X	X			X	X	X	
Bill Allen			X	X		X	X			X	X	X	
Jim Miller		X	X	X	X	X	X	X			X	X	
Joy Ross		X		X	X	X	X			X	X		

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Attendance Report By Period
Seekers (adults)
January 7, 2001 To April 1, 2001
Sherpherd Group 4 - Name of leader

Name:	01/07/01	01/14/01	01/21/01	01/28/01	02/04/01	02/11/01	02/18/01	02/25/01	03/04/01	03/11/01	03/18/01	03/25/01	04/01/01
Al Delvecchio													
Camille Delvecchio													

8- Press **Return/Enter** or click **OK.**

9- Select **Printer** on the **Set Report Destination** screen.

10- Press **Return/Enter** or click **OK.**

11- Send report to the printer and report will be printed.

This report includes individuals' attendance for the event or class or group for a 13-week period and is displayed in grid form as shown below.

Visitors Attendance

Adding Attendance Records for Visitors

CDM Plus allows detailed tracking of visitors' attendance and visitor follow-up within the attendance module.

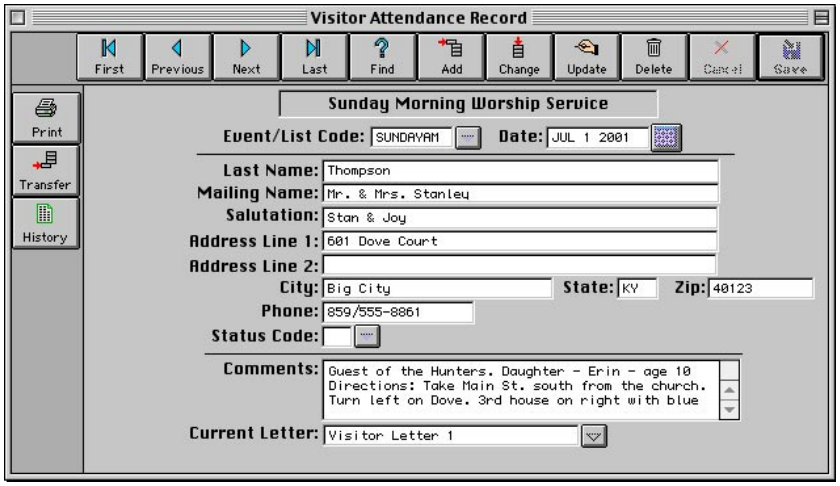
1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Attendance,** select **Visitors Attendance or** click the **Visitors Attendance** icon on the Tool Bar.

3- Click **Add.** A dialog box appears, indicating this to be a multiple add function. You should press **Return** to add a record, and after the last record is added, you must click **Cancel**. Press **Return/Enter** or click **OK** on this dialog box.

4- Click on the **Arrow** button beside the **Event/List Code** field. The **Select Type and Code** window appears.

5- Click once on the type and then double-click on the particular code for the event, class, or group this person visited.



6- Enter the date of the visitors' attendance using the calendar button or type the date manually.

7- Press the **Tab** key and type the **Last Name**.

8- Press the **Tab** key and type the **Mailing Name**. e.g. - *Mr. & Mrs. William* or *Mr. and Mrs. William*). Do not type the last name again here. Use the *&* or *and* but use the same one every time. Consistency of data entry is **EXTREMELY** important.

9- Press the **Tab** key and type the **Salutation** (e.g. - *Bill & Mary*).

10- Press the **Tab** key and type the **Street Address** of the visitor.

11- Press the **Tab** key.

NOTE 3.10: If you don't remember that this person has attended before and you try to insert them again, CDM Plus will look for them by last name and the first 8 characters in the address and tell you if they are already in the system.

12- Type the second line of the street address if applicable. Leave this field blank if there is no second address line and move on to Step 13.

13- Press the **Tab** key and type the name of the **City**.

14- Press the **Tab** key and type the two-letter abbreviation for the **State**.

15- Press the **Tab** key and type the **Zip Code**. The zip+4 may be typed in if that information is available.

16- Press the **Tab** key and type the **Phone Number**.

17- Click on the **Arrow** button beside the **Status Code** field, and enter your choice by double-clicking from the list of Visitor Attendance **Status Codes** created using the **Master Coding System** (See **Appendix A**). If you have not yet created codes using the **Master Coding System**, you may put a 1,2,3, etc. here to indicate if this is the person's first, second, third, etc. visit.

18- Type any pertinent information in the **Comments** field (e.g.—the member the person visited, directions to the visitor's house, the number of children in the family, etc.)

19- Click the **Arrow** button beside the **Current Letter** field and double-click on the code for the current visitor letter this visitor should recieve. See instructions below for creating visitor letters.

20- Click **Save**.

21- Click the **Print** button and send the report to the printer to print this visitor attendance record. This printout is especially good to give to a staff member or layperson who will call on this visitor.

Creating Visitor Letters

1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Attendance,** select **Visitor Letter Setup.**

3- Click **Add**.

4- Give the letter a title or code (e.g.—**VL1** for First Time Visitor Letter, or use the entire title, **First Time Visitor Letter**.)

5- Press the **Tab** key and type the letter you wish to send to first-time visitors. Include only the text, not the salutation. CDM Plus will create the salutation for you.

   Please note that this field is not "WYSIWYG" (what you see is what you get). For example, changing the font size or margins will not be reflected in what you see on this window, only in what you print.

6- Press the **Tab** key and set each **Margin** so the letter will fit on your letterhead.

7- Set the **Font Size** from the pull-down list.

9- Select the radio button beside desired **Print Orientation**.

10- Turn on the checkbox beside **Print Address Information** if you want the inside address printed on the letter.

11- Press **Return/Enter** or click **Save**.

12- Repeat steps 3–13 until all needed visitor letters are entered. (e.g.—First Time Visitor Letter, Second Time Visitor Letter, Out-of-Town Visitor Letter, etc.)

Updating Visitor Attendance Records

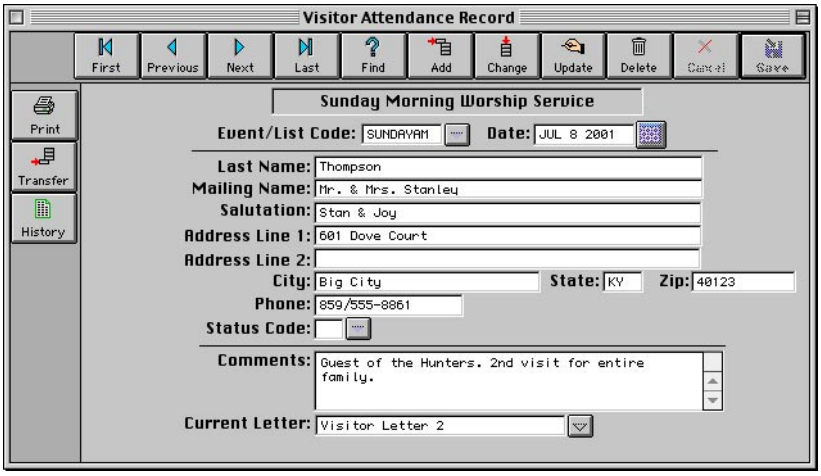
1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Attendance**, select **Visitors Attendance or** click the **Visitors Attendance** icon on the Tool Bar.

3- Click the **Find** button.

4- Type the last name of the visitor (other Fields, Criteria, and Options may be used here to find the proper record).

5- Press **Return/Enter** or click **OK**. This should bring up the visitor attendance record. If necessary, click on the **Next** button to find the correct family.



6- Click the **Update** button.

NOTE 3.11: When tracking the interest of visitors to your church, use the **Update** opton rather than **Change**. The Update function will maintain a history of previous visitor's attendance. This history can be viewed by clicking of the **History** button. The history window also displays the listing of letters that have been sent and allows for the entering of information about visits. *The letter information is updated automatically when visitor letters are generated from CDM Plus, but visit information must be entered by the user.* Use the **Change** button to update visit information, make changes of address or modify notes.

7- Click on the **Arrow** button beside the **Event/List Code** field if the proper code is not already there. The **Select Type and Code** window appears.

8- Click once on the type and then double-click on the particular code for the event, class, or group this person visited.

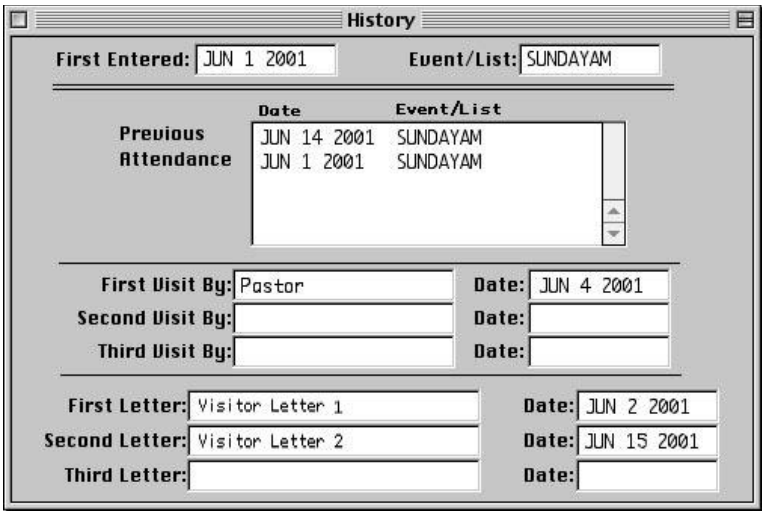
9- Enter the new date of the visitor's attendance. You may enter the date manually or use the calendar button to choose the date.

10- Click on the **Arrow** button beside the **Current Letter** field and double click to choose the code or title for the letter this visitor is to receive now. Leave blank if you do not send a second letter.

11- Press **Return/Enter** or click **Save**.

12- Click the **History** button.

13- **Previous Attendance** dates will begin to appear here. You may also enter information about visits and letters. This carefully tracks the church's follow-up of visitors.



NOTE 3.12: You must click the **Change** button on the first window and then go to the **History** window to enter information about visits and letters.

Printing Visitor Letters

1- Under **CDM+** on the menu bar select **Attendance** or click the **Attendance** icon on the Tool Bar.

2- Under **Reports,** select **Visitor Reports/Letters.**

3- Click once on the type and click once on the particular code for the event, class, or group for which you want to print letters.

4- Enter the attendance date range **beginning date** for which you wish to print letters. You may enter the date manually or use the calendar button to choose the date.

5- Press the **Tab** key and enter the attendance date range **ending date,** or use the calendar button to choose the **ending date** for which you wish to print letters. If you want to print letters for just one Sunday, enter that date in both date fields.

6- You may leave **Selected Status Codes** blank or use the **arrow** buttons to enter the selected status codes you wish to include.

7- Press **Return/Enter** or click **OK**.

8- Select **Letter** under **Notice**.

NOTE 3.13: You may also choose to print lists, labels, or a tab-delimited merge file document from this window.

9- Press **Return/Enter** or click **OK**.

10- Enter date to appear on the visitor letters and click **OK**.

11- Select **Printer** on the **Set Report Destination** screen.

12- Press **Return/Enter** or click **OK.** Personalized visitor letters will now print.

NOTE 3.14: After the letters have printed you may return to step 2 above and choose **Label/Env.** on the **Select Report Format** screen and print envelopes to go with the letters.

NOTE 3.15: After printing is completed a dialog box appears with the message, "**Update visitor letter records?"** click **Yes** to have the **Visitor Attendance History** updated with letter title and date sent information.