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CHILD CHECK IN OVERVIEW

Check In / Out Process
The child check in system in Roll Call allows you to check students into their classes, record attendance and print name tags and security labels. This system can be used to check people into any groups/classes or worship service that is defined in Roll Call.

Check In Methods
When the student arrives to check in, the first thing you need to do is identify that student or family. You can identify them in a variety of ways. These methods are discussed below.

Key Tags
Probably the most popular method for checking students in is to issue key tags to the parents. These key tags can be customized to have your church or ministry logo on the front and a bar code on the back. The bar code number is assigned to mom, dad or the individual student. Key tags can be used to check students in an unmanned station or a manned station.
Bar Code Badge
Another option for using a bar code scan to check students in, is to print a bar code badge from Roll Call. These badges are printed on an 8 ½ x 11 sheet of paper or on Avery business card stock. Once you have the badges printed, you can laminate them and issue to the families. Badges can be used to check students in using an un-manned station as well as a manned station.

Name, Phone, Family Number
If you do not want to scan a bar code, you can use the keyboard or a touch screen monitor to identify who is here to check in. You can type in the last name, last 4 digits of the phone number or a family number. The person manning the check in area simply types the last name or number, then selects the student from the list. Typically when checking in using a name, phone number or family number a volunteer will be manning the check in station.

Finger Print Scan
Another option for identifying who is here to check in, is the finger print scan. This option is only available on the Windows platform. This mode of check in can be used on an un-manned station or a manned station.
Name Tags and Security Tags
Once the student checking in has been identified and checked into their class, name tags
and parent tags can be printed.

The Roll Call system requires a Dymo Labelwriter 450 or 450 Turbo to print the labels. We
support two different size labels. The first is a smaller label (30334). Your church
can also opt to use the larger 30256 label. This option gives you more flexibility as to the
information included on the label. You logo can also be printed on this label.

A parent tag or security can also be printed. This tag will only include the security
number on it. There will be no information about the child on this tag. The parent brings
this tag to the classroom to pick up their child. The teacher will compare the numbers
on the child’s name tag with the number on the parent tag. If they match, the teacher can
release the child.

Mobile Device
With a Mobile CheckIn license, you can check in using an iPad, iPod, smart phone or
other tablet. You can check in students by name or phone number. The name tags are
printed in a central location where Roll Call is running as a print queue user or on a
brother wireless printer.

If you’d like to record attendance but not print labels, you can check in by group or by
keyword. This will return a list of people in that group, and you can mark them present
from this list.

Use an iPad or other mobile device to check students in by name of phone number.

Place your logo here.

Child’s name tag can include name, class checked into, parents names, allergies and

Security number.

Jerry O’Fallon
3rd Grade - Thu 6:00 AM
Parents: Jim & Cindy O’Fallon
Allergies: Peanuts
My Church
11/13/2004
Check Out

To check a child out using the Roll Call system, you will need to once again identify that child. The station operator will see that the child is checked in, they can click the button to check them out of that class. If there are any custody comments for this child, they will be displayed when the check out button is pressed. The station operator can take any necessary action to ensure the child is leaving with the proper parent or guardian.

We’ve found that most churches do not check out using the system. They compare the security code on the parent tag with the code on the child’s tag to determine if the child can be released.
INSTALLING ROLL CALL FOR CHILD CHECK-IN

Hardware/Software Requirements

Roll Call workstations
To use a single check-in station, you’ll want to install Roll Call Standalone. If you will be using multiple check in station, each “kiosk” needs to have a computer with Roll Call Client installed. All the check in computers must be on the same network as the machine that is running Roll Call Server.

Bar Code scanner
If you will be checking students in using bar code technology, each check-in station will need a bar code scanner. The scanner needs to be a keyboard wedge device with the ability to scan a single digit. We recommend the Voyager CG hand held scanner. These scanners may be purchased through By the Book.

Dymo LabelWriter
This printer is required if you wish to print labels for the child and parent upon check in. The program is expecting a Dymo LabelWriter 450 or 450 Turbo printer. You may choose from 2 different label sizes, the 30256 shipping label or the 30334 multi-purpose labels.

Brother Wireless Label Printer (QL-710w)
This printer is an option if you will be using Mobile CheckIn and would like to print the name tags and parent tags to a wireless printer. The brother label that we use is the 66mm x100mm size.

Finger Print Scanner
If you will be checking students in using biometrics, you’ll need the M2Sys finger print scanner connected to a Windows version of Roll Call.

Finger Print Software
If you’ll be checking students in using their fingerprint, you’ll need the M2Sys finger print software installed on a Windows computer.

Roll Call Software Installation

Single user version
The single user version of Roll Call allows one user, on one computer to access Roll Call. For the single user installation, use the following instructions.

To install Roll Call double click on the Roll Call installer file you downloaded. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, Windows users will have a Roll Call icon on the desktop. If you are a Mac user, you will need to drag the application from the Applications Roll Call folder to the dock. To use Roll Call, double click on that icon. The first time you start Roll Call it will ask if you wish to run the Full or the Lite version. Choose Full.
Network Version

A network installation of Roll Call allows multiple people to access the data. If you have a multi-user license, multiple users can access the data simultaneously. For example, if you want to have 3 check in stations, you will need to use the network version of Roll Call, so all 3 stations are using the same information.

For the network installation, you will need to have your computers networked together. You will need to install Roll Call Server software on the computer that will house the database. You will need to install Roll Call Client software on all computers that need access to the data.

To install Roll Call Server double click on the Roll Call Server installation file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, Windows users will have a Roll Call Server icon on the desktop. If you are a Mac user, you will need to drag the application from the Applications Roll Call folder to the dock. To start Roll Call Server, double click on the icon. For users to work in Roll Call the Server must be running.

To install Roll Call Client double click on the Roll Call Client installation file. The install program will prompt you through the process. Click on the NEXT button to continue through each step of the process.

Once the installation is complete, Windows users will have a Roll Call Client icon on the desktop. If you are a Mac user, you will need to drag the application from the Applications Roll Call folder to the dock. To start the Client, double click on the icon. The Client will see Roll Call Server running on the network and connect to it. The first time you connect in, it will ask if you wish to run the Full or the Lite version. Choose Full.

Check in Station Hardware Installation

In a network environment, each check in kiosk should have Roll Call Client installed with access to Roll Call Server. In a single kiosk environment, the station should have Roll Call standalone installed.

Bar Code Scanner

If you will be using bar code technology to check student’s in, plug the scanner into a USB port on your check in station. You can confirm that the scanner is working properly by scanning a bar code from a badge or keytag while you are in Text Edit (Mac) or Notepad (Windows). If the bar code number pops into the page, the scanner is working properly.

Dymo Labelwriter

If you will be printing name tags and/or security labels, plug your Labelwriter into a USB port. Make sure to install the printer drivers first then follow directions for plugging in the printer.

If you are on a Windows machine, go to Printers and Faxes at the operating system level and choose properties for the Dymo Labelwriter. Click on Printing Preferences. For the 30334 labels, click Portrait. For the 30256 labels, select Landscape. Click on the ADVANCED button, then select the appropriate labels size.
If you are a portable church, or are plugging the Labelwriters in each Sunday, please note, on some Windows machines, a new printer definition is created each time you plug in the printer. Make sure you only have ONE Labelwriter printer definition and that it is online.

**Brother Wireless Label Printer (QL-710w)**

If you will be using Mobile CheckIn (iPads, Tablets or Smartphones) for checkin, you may choose to print your labels on a Brother wireless printer. You will need to install the print drivers for each Brother printer on a computer that will be logged into Roll Call during your check in timeframe. You can define multiple brother printers on a single computer, but make sure to give them unique names.
CONFIGURING CHECK-IN

To begin configuring Roll Call for child check in, expand the Check In/Out menu. Click on the Setup menu item. Begin entering the information and click NEXT through each page. As you complete a section, a green check mark will be displayed on the related icon at the top. When all icons have a green check, you know you are ready to start using the check in system.

User Security and Check In Users.

To use Roll Call’s child check in/out system you must “sign into” the system as a check in user. The type of user determines the screens you will see. So the first thing you will need to do to activate the security system and set up the “check in” type users.

Activate Roll Call Security

To activate the security system within Roll Call you must give the Director user a password. To do this:
1. Expand the Check In/Out menu.
2. Click on the Setup menu item.
3. Enter the password you’d like to give to Director. Then re-enter that password to confirm.
4. Click SAVE. Make sure to save this password before you click NEXT to go to the next step in the process.

Create Check In Users

After you’ve entered the Director password and clicked NEXT, you will be at the window to add check in users. To add a check in user, click on the plus sign in the lower left of the window. Enter the following information:
1. Username – enter the name for this specific check in user.
2. Password – enter a password for this specific user or leave it blank.
3. Confirm – re-enter the password if you entered one.
4. Check In User (Client) – choose this option for computer station check in users
5. Check In User (Mobile) - choose this option for users that will be using mobile devices to perform check in.
6. Print Queue - choose this option for a user that will be for your printing station.
7. Click OK to save this user.
Enter a username and password for this user. Make sure to choose a check in “type” user.

You are now taken to the window to select the properties for this specific check in user.

**Check In User - Types**

There are several parameters for the check in user type. You can select one or more of these parameters for each check in user.

*Self Check In* – If the check in user has “self check in” marked, this user will not be able to view any address information from the people list screens. This user will not be able to print the check in roster or change any of the find by options. Use this type of user for “unmanned” or kiosk type stations.

*Touch screen* – if the check in user has “touch screen” marked, a virtual keyboard will be displayed on the screen. If you also have “self check in” marked, a virtual numeric keypad will be displayed so folks can search by last 4 of the phone number.

*Rapid Check In* – if the check in user is marked as “rapid check in”, the confirmation screen will not be displayed. The person selected will automatically be checked into the class they are enrolled in. This assumes each student is only enrolled in one class at a time. If two classes are available for a student to check into, the confirmation screen will be displayed so the user can decide which class they will be attending.

*Check-Out* – if the check in user is marked as “check out”, the user will be able to see if someone is already checked into a class. They will also be able to check that person out of a class. If Check-Out is not marked, the option to check out will not be available on the screen.
Add Visitor – if the “Add Visitor” option is checked for this user, the Add Visitor button will be displayed. This will allow the user to enter visitor information and then check them into a class.

Dashboard – if the “dashboard” option is checked for this user, the dashboard tab will be displayed on the check in screen. This will allow the user to view how many students are currently checked into each class.

Check In User - Defaults
For each check in user you can set the following defaults:
1. Do you want to search by name, phone, badge or family number?
2. Do you want to return families or individuals?
3. Do you want to only children displayed?
4. Which campus groups should be considered for this check in?

Search by – if you are not using a bar code scan or fingerprint scan to identify who is there to check in, you will need to identify them based on their last name, last four digits of the phone number, badge number or the family number. If this user is not a “self check in” user, you can change the search by criteria from within the check in screen. Self Check In users can only search by last four digits of the phone.

Return Families or Individuals – if you are doing a bar code scan or fingerprint scan and have “return by family” checked, a list of all the family members will be returned when you perform the scan. If you are searching by name, phone, badge number or family number, a list of families will be returned that meet the entered criteria. Then the user will need to highlight the appropriate family. Next a list of family members will be presented so you can choose the ones that will be checking in.

If you are doing a bar code scan or fingerprint scan and have “return by individual” checked, only the person assigned that bar code number (or fingerprint) will be returned. Typically you would use this to check students into a youth group or adult class.

If you are searching by name, phone or family number and have “return by individual” checked, a list of people that meet that criteria will be displayed. For example, if you search by name and enter “Smith”, a list of everyone who has the last name “Smith” will be returned. You can highlight one or more from the list to check them in.
List Only Children – if the “list only children” option is checked for this user, only people in your database with a family position of “child” will be displayed in your selection lists.

Default Campus - if system preferences are set to allow multiple campuses, each check in user can have a default campus defined. This means that the user will only be able to check into groups/classes/services that are from that campus. For example, if the check in user has a default campus “Southside”, they will only see groups that also have Southside as the campus.

Check In User - Screen Appearance
For each check in user, you can set preferences that affect the appearance of the screen. You can set the heading, color and image that is displayed. For each check in user, enter the following information:
1. **Check In Header** – Enter the heading you’d like displayed on the Check In Screen
2. **Header Font** – Select the font for the heading
3. **Header Font Size** – Select the size of the font for the heading
4. **Header Font Style** – Select the font style for the heading
5. **Header Color** – Select the color of the heading
6. **Check In Image** – Click the plus sign to pull in the graphic logo you’d like displayed on the check in screen.
7. **Background Color** – Select the color you’d like as the background on the check in screen.
8. **Alternate Color** – Select the color you’d like to use for alternating data on the selection boxes.

Enter the check in station header you want when this user signs in.

Pull in the image you want displayed for this check in user.

Now, when you sign in as that check in user, the screen includes the logo and new heading.
Once you have selected all the information necessary for your check in user, make sure to press the SAVE button.

**Name Tags & Parent Tags**

Use the “tags” section to set your preferences for printing name tags and parent tags. Once you hit next from the check in user screen, you will be asked if you want to print name tags upon check in. If you do, click Yes. Click NEXT.

Next, you’ll be asked which size you’d like to use. We have 2 standard sizes. The 30256 is the larger shipping size label. The 30334 is a smaller multi-purpose label. If you’d like to use a different size label, or customize the information that is printed on the label, choose the customize option. This will take you to the form to create your label. For detailed instructions on customizing the name tags, see the next chapter on *Customizing Name Tags and Parent Tags*.

Choose the size labels you’d like to use for printing name tags and parent tags.

Click NEXT.

The next window asks if you’d like to print a parent tag for children. The parent tag lists only the security number that matches the child’s name tag. Parent tags are only printed for people in the database whose family position is Child.

If you will be using a parent tag, indicate the number you’d like to use as the security number on the name tag and the parent tag. You may choose from the family number, a random security number that uses numbers and characters or a random security number that is strictly numbers. Click NEXT.

Indicate if you’d like parent tags printed for children.

Indicate the security number you’d like displayed.

Click NEXT.
From this window, select the information you’d like printed on the child’s name tag.

1. *Logo* – if you are using the 30256 size labels, you can print a ministry logo in the upper left of the label. Make sure the logo is not a high resolution logo, or it can increase the time it takes to print the label. Click ADD IMAGE to pull in the graphic.

2. *Barcode* – some churches print the barcode on the label itself for easy check out.

3. *Security number* - choose the security number you’d like printed on the child’s name tag. The badge number is not allowed if you will be printing parent tags. The badge number uniquely identifies the child. The family number is a number assigned to the family in roll call. The random security number is randomly determined by the system. The random number will change from week to week. The badge number and family number will not change from week to week.

4. *Allergies* – any allergies listed in the “Special Needs” comment section will be displayed on the name tag if this is checked.

5. *Last Name same size as First* – By default the first name is in a larger font that the last name. If you’d like them to be the same size, check this box.

6. *Session Time or Check In Time* - You can choose to include the group start time or the actual time that they checked in.

Mark the options you’d like to include on the name tag for children.

Click NEXT.

When you’ve checked the options you’d like for the name tag, click NEXT to choose a logo for Youth and Adult name tags. The youth and adult name tags will only include their name, the date of the event and the group they are checking into. There is no security number, barcode or allergy information printed on an Adult tag.

To add a logo for the Youth/Adult tag, click the box for logo. Click the ADD IMAGE button and navigate to that image file. Click NEXT to continue through the check in set up process.

At this point you may want to install your Dymo printer and run a test label to make sure everything looks okay. Once you have the printer installed, click on the PRINT TEST button. If everything prints okay, click NEXT to continue through the set up process.
Check In Preferences

The check in preferences allow you to set the “check in time frame”. You can set the number of minutes before a class, event, worship service starts you’d like to begin the check in process. You can also set the number of minutes before a class ends that you will no longer allow anyone to check into that class.

To enter these preferences, click NEXT from the print test label window, or click on the preferences setup icon.

As an example, let’s say we have a Sunday school class that meets from 9:30 to 10:30, if we set our beginning time to 30 minutes before, we can begin checking kids in at 9:00 a.m. In this same example if we set the ending minutes to 15, we could check students into that class until 10:15. At 10:15 we would no longer see this class in our list of classes to check into.

You also have the option to choose what you’d like as the default association in the Add Visitor portion of check in. The Add Visitor is what you use to enter visitors into the system so you can check them in. Go ahead and use the drop down to pick the association your church uses to identify a visitor. This option is not available for Mobile CheckIn.

The welcome screen text is an area that you can define pieces of information that you’d like to view on the Confirmation screen. Maybe you’d like to see a birthday or association come up for each person as you are checking them in. You’ll need a bit of programming here, so call us at 800.554.9116 and we’ll help you get this set up.

Groups

To use the child check in functionality, there must be something to check into. You can check people into Groups or Services. The Groups area in Roll Call is where you would set up your Sunday school classes, VBS, membership classes etc. The Services area is where you set up your worship services. Each group that you will be checking into must have at least 1 session. A session is the day and time that it meets. For example, if you had a first grade Sunday school class that meets at 9:30 and 11:00, those times would be sessions.

To add a group through the check in setup area, click on the plus sign in the lower left corner. You are now at the window to add a group. For more details on creating groups, see the Creating Groups chapter in this manual.
Enter the group name header information. Click the plus sign to add sessions (day and time).

Click the plus sign to add a group.

To change the time, click in the start time. The row will be highlighted. Click again to change.

People

You will also need to have your children entered into the system and enrolled into their classes to use the check in system. To enter people through the check in setup area, click the plus sign in the lower left corner. You are now at the people entry screen. For more details on entering people, see the Entering People chapter in this manual.

To add people, click on the plus sign in the lower left.
Enter the contact information for this person. Click SAVE & CLOSE to save and leave.

Key tags

If you will be ordering key tags for use with the Roll Call child check in system, click NEXT from the People list in the set up process or click on the Key tags graphic. The first window asks if you’ll be using Key tags. If so, answer yes. If not, answer no.

To assign a key tag to a person, highlight their name in the list. Click on their barcode number (assigned by roll call) Once that number is highlighted, scan the key tag. This will assign the new number to this person.
CUSTOMIZING CHECK-IN LABELS

If you would like to use a label size other than the 30256 or the 30334, you will need to create a custom label. If you’d like additional information on the name tags that is not included on the standard 30256 or 30334 labels, you’ll need to create a custom label.

If you choose to customize your labels, you’ll need to customize the parent tag, child tag and adult/youth tag

Set the Label Size

In order to customize your check-in labels you must go into the Check-In/Out setup wizard from the Navigator screen.
1. Click on the Tags icon
2. Answer Yes to the question “Do you want to print tags?”
3. Click NEXT
4. Mark the Label Size option Custom
5. Choose the Label Size you will be using. If you will be adding information to the 30256 or 30334 labels, you’ll need to select that size in the custom area.
6. Choose Portrait or Landscape (this will depend on your label size and orientation)
7. Click NEXT

Customize the Parent Tag

If you have marked the option to create custom labels, you will need to also customize the parent tag. From this window, answer “Yes” if you wish to print a parent tag. Next choose the security number you’d like to use on the parent tag. Once you’ve made those selections you may begin defining your parent tag.
1. Click CUSTOMIZE PARENT TAG
2. The canvas and object library windows are displayed. The canvas is used to layout the tag and position the fields on the tag. The object library contains all the available fields that can be used on the canvas.
3. To create the parent tag, define the canvas, place fields on the canvas, and format the fields.
4. Click SAVE icon to save the parent tag definition.
Define the Canvas

Before you begin dragging and dropping fields onto your canvas, you’ll want to:
1. Set the page size
2. Place your markers
3. Outline the upper left quadrant with a box. This makes it easy to see the area you have to work in.

Click on the page size icon. This will allow you to set the page size and orientation.

Click on page set up icon.

Select your Dymo Printer and Label Size.

The canvas area that represents the label is the upper left quadrant. If any objects are placed outside of that quadrant, multiple labels will be printed.

Next you’ll need to place your markers at the appropriate height. The markers are the lines that go horizontally across the canvas. They have an arrow on the right side of the grid. If you don’t see the markers, right mouse click on the canvas and select Display>Markers.

There are three markers: Detail, Break and Footer.

All three of these markers need to be set just above the line, which represents the bottom of the label. If these markers need to be moved, click on the arrow then drag to the appropriate position. Do not place fields below these lines.
You may wish to draw a box around the area on the canvas where you can place fields. This makes it much easier to see the area that you’ll be using. Click on the box icon on the left side of the canvas. Place your cursor in the upper left of the label area and drag it to the lower right area of the label area. You now have a white area in the upper left quadrant that represents the area that you can place fields.

**Place Objects**
You may place static text, images or data from the object library on your canvas.

To place static text onto the canvas, click on the Text tool on the left side of the canvas. Now draw a text box on the canvas. Enter your text. You may use the property box on the right to modify the size and font of the text.

To place an image on the label, open the image file in a previewer, copy it and paste it on the canvas. You can then resize it and move it where you’d like it. Please note, if your image is a large high-resolution image, it can slow down your printing time.

To place data or system information, drag the applicable field from the object library onto the canvas. To change the size or font of the data, select the field on the canvas, and use the property box to change size and font.
To align fields on the canvas, use the alignment tool on top of the canvas to center, align left or align right. Fields that would make sense to include on the parent tag would be Current Date, Family Number, or Security Code. A full list and descriptions of the fields available in the Object Library can be found in Appendix A.

Highlight all the fields on the canvas.

Use the alignment tool to align left, right, center.

**Save Parent Tag Definition**

Once you’ve created your parent tag, click the SAVE icon to save your customizations.

Click the SAVE icon to save your customized tag.
Test the Parent Tag

After saving your definition, you’ll want to test it. Close the canvas window. Click PRINT TEST LABEL. If everything prints okay, click NEXT to move on to the customization of the child tag. If the parent tag did not print properly, click CUSTOMIZE again to make necessary corrections.

This is a bit of a trial and error process. Once everything is working, you will want to delete the box outline around the objects on the canvas. Highlight the box and click the delete key on your keyboard. Make sure only the outline is highlighted, not all the objects within the box.

Customize the Child Name Tag

Once you’ve completed the customization of the parent tag, you can move on to customize the child’s name tag. From this window, you can set your security number, customize the tag and test the tag.
1. Click CUSTOMIZE CHILD TAG
2. The canvas and object library windows are displayed. The canvas is used to layout the tag, as well as position fields on the tag. The object library contains all the available fields that can be used on the canvas.
3. To create the child tag, define the canvas, place fields on the canvas, and format those fields.
4. Click SAVE icon to save the child tag definition.

Define the Canvas

Before you begin dragging and dropping fields onto your canvas, you’ll want to:
1. Set the page size
2. Place your markers
3. Outline the upper left quadrant with a box. This makes it easy to see the area you have to work in.

Click on the page size icon. This will allow you to set the page size and orientation.
Click on page set up icon.

Select your Dymo Printer and Label Size.

The canvas area that represents the label is the upper left quadrant. If any objects are placed outside of that quadrant, multiple labels will be printed.

Next you’ll need to place your markers at the appropriate height. The markers are the lines that go horizontally across the canvas. They have an arrow on the right side of the grid. If you don’t see the markers, right mouse click on the canvas and select Display>Markers.

There are three markers: Detail, Break and Footer. **All three of these markers need to be set just above the line, which represents the bottom of the label.** If these markers need to be moved, click on the arrow then drag to the appropriate position. Do not place fields below these lines.

You may wish to draw a box around the area on the canvas that you can place fields. This makes it much easier to see the area that you’ll be using. Click on the box icon on the left side of the canvas. Place your cursor in the upper left of the label area and drag it to the lower right area of the label area. You now have a white area in the upper left quadrant that represents the area that you can place fields.
Click on “draw box” icon.

Draw box on canvas to represent the area where you can place objects.

**Place Objects**

You may place static text, images or data from the object library on your canvas.

To place static text onto the canvas, click on the Text tool on the left side of the canvas. Now draw a text box on the canvas. Enter your text. You may use the property box on the right to modify the size and font of the text.

Click on Text tool.

Enter your static text.

To place an image on the label, open the image file in a previewer, copy it and paste it on the canvas. You can then resize it and move it where you’d like it. Please note, if your image is a large, high-resolution image, it can slow down your printing time.

Object library. Lists all data that can be printed on tag.

Drag field from object library onto canvas.
To place data or system information, drag the applicable field from the object library onto the canvas. To change the size or font of the data, select the field on the canvas, then use the property box to change size and font.

To align fields on the canvas, use the alignment tool on top of the canvas to center, align left or align right. A full list and descriptions of the fields available in the Object Library can be found in Appendix A.

**Save Child Tag Definition**

Once you’ve created your parent tag, click the SAVE icon to save your customizations.

**Test the Child Tag**

After saving your definition, you’ll want to test it. Close the canvas window. Click PRINT TEST LABEL. If everything prints okay, click NEXT to move on to the customization of the adult/youth tag. If the child tag did not print properly, click CUSTOMIZE again to make necessary corrections.
This is a bit of a trial and error process. Once everything is working, you will want to delete the box outline around the objects on the canvas. Highlight the box and click the delete key on your keyboard. Make sure only the outline is highlighted, not all the objects within the box.

Customize the Adult/Youth Name Tag

Once you’ve completed the customization of the child tag, you can move on to customize the adult/youth name tag. From this window:
1. Click CUSTOMIZE ADULT TAG
2. The canvas and object library windows are displayed. The canvas is used to layout the tag, as well as position fields on the tag. The object library contains all the available fields that can be used on the canvas.
3. To create the adult tag, define the canvas, place fields on the canvas, and format those fields.
4. Click SAVE icon to save the adult tag definition.

Define the Canvas

Before you begin dragging and dropping fields onto your canvas, you’ll want to:
1. Set the page size
2. Place your markers
3. Outline the upper left quadrant with a box. This makes it easy to see the area you have to work in.

Click on the page size icon. This will allow you to set the page size and orientation.

The canvas area that represents the label is the upper left quadrant. If any objects are placed outside of that quadrant, multiple labels will be printed.

Next you’ll need to place your markers at the appropriate height. The markers are the lines that go horizontally across the canvas. They have an arrow on the right side of the grid. If you don’t see the markers, right mouse click on the canvas and select Display>Markers.

There are three markers: Detail, Break and Footer. **All three of these markers need to be set just above the line, which represents the bottom of the label.** If these markers need to be moved, click on the arrow then drag to the appropriate position. Do not place fields below these lines.
Click on marker arrow to move up or down.

You may wish to draw a box around the area on the canvas that you can place fields. This makes it much easier to see the area that you’ll be using. Click on the box icon on the left side of the canvas. Place your cursor in the upper left of the label area and drag it to the lower right area of the label area. You now have a white area in the upper left quadrant that represents the area that you can place fields.

Click on “draw box” icon.

Draw box on canvas to represent the area where you can place objects.

**Place Objects**

You may place static text, images or data from the object library on your canvas.

To place static text onto the canvas, click on the Text tool on the left side of the canvas. Now draw a text box on the canvas. Enter your text. You may use the property box on the right to modify the size and font of the text.

Click on Text tool.
Enter your static text.
To place an image on the label, open the image file in a previewer, copy it and paste it on the canvas. You can then resize it and move it where you’d like it. Please note, if your image is a large, high-resolution image, it can slow down your printing time.

To place data or system information, drag the applicable field from the object library onto the canvas. A full list and descriptions of the fields available in the Object Library can be found in Appendix A.

![Object library](image)

Object library. Lists all data that can be printed on tag.

To change the size or font of the data, select the field on the canvas, and use the property box to change size and font. If you don’t see the property list, double click on the field on the canvas.

![Property List](image)

Scroll down to find font and size section. Make any changes here.

To align fields on the canvas, use the alignment tool on top of the canvas to center, align left or align right.

![Alignment Tool](image)

Highlight all the fields on the canvas.

Use the alignment tool to align left, right, center.
Save Adult Tag Definition
Once you’ve created your adult tag, click the SAVE icon to save your customizations.

Test the Adult/Youth Tag
After saving your definition, you’ll want to test it. Close the canvas window. Click PRINT TEST LABEL. If everything prints okay, you are done with customizing the labels. If the tag did not print properly, click CUSTOMIZE again to make necessary corrections.

This is a bit of a trial and error process. Once everything is working, you will want to delete the box outline around the objects on the canvas. Highlight the box and click the delete key on your keyboard. Make sure only the outline is highlighted, not all the objects within the box.
CREATING GROUPS

Group Hierarchy

Groups are defined by the following classifications:

1. Campus. If your church has multiple campuses or locations with different groups and classes at each site, you may want to define your groups at the campus level. The campus indicates which site or location the group stems from.

2. Group Type. The next level in the hierarchy is group type. This tells us the general classification of the group. Is the group a committee, a small group, a Sunday school class or a youth group? Your church defines these group types or classifications. Roll Call’s default group types are Group and Class.

3. Department. The next level in the hierarchy is the department. The department is the ministry area within your church that is responsible for overseeing the group. Children’s Ministry, Congregational Care, Youth and Music are some common departments.

4. Status. The status indicates whether the group is active or inactive.

Add a Group

Enter general information

From the Check In wizard, in the groups area, click on the plus sign to add a group. Once you are in the screen to add the group:

1. Enter the values for Campus, Group Type, Department and Status.
2. Enter the specific Group Name.
3. If the group has a leader, enter the last name in the Leader field. Press tab to view a list of the folks with that last name. Select from the list.
4. If the group has a co-leader, enter the last name in the Co-Leader field. Press tab to view a list of the folks with that last name. Select from the list.
5. Enter the Location of the group, if applicable.
6. Indicate if the group meets weekly or randomly. A group or class that you will be checking into, must be set up as a weekly group.
7. You may enter any comments or notes in the Notes field.
8. The Start Date will default to today’s date. You may change it if you’d like.

To use the check in system, you must also enroll your children into the group/class and define the days and times that this class meets.
Add Members

To enroll people into the group, press the Members tab. From within the members tab:
1. Click the plus sign in the lower left of the window. A new window will be displayed for you to enter the Last Name and First Name (or portion of the last name) of the person you want to enroll.
2. Select the appropriate person to enroll in the group.
3. Tab across to enter any of the custom field data for this person. If you need to define the membership custom field names, click CHANGE TITLES and enter the name of the data you’d like to capture.

Create sessions

Next, you’ll want to indicate which days and at what times the group meets. The meeting days and times are called sessions in Roll Call. A group that meets weekly can have an unlimited number of sessions. You can only check people into groups that are currently meeting.

To create a session:
1. Click on the session tab, if sessions are not currently displayed.
2. Click on the plus sign in the lower left. A row will be displayed, with a default of Sunday and time of 12 a.m.
3. Use the Day of Week drop down box to select the appropriate day.
4. Enter the Start Time.
5. Enter the End Time.
6. Place your cursor under Room and double click to enter the room number of this group meeting.
Preferences

Use the preferences tab in the group screen to:
1. Tell Roll Call how many labels you wanted printed upon check in into this group.
2. Tell Roll Call which fields to print on the Attendance Roster.
3. Set age ranges for graduation.

Mass Enrollment

To enroll multiple people into a group at once, choose Mass Enrollment from the Administration menu at the top.

Select Association

To limit the people in the list based on an association, click over each association you’d like in the list.

Select Male or Female

To limit the list of possible enrollees to a certain Gender, check the box for Male or Female. This can also be used in combination with Age range and association. For example, if you wanted only male members, you could check the box for male and click over the association Member.

Enter an age range

To limit the selection of possible enrollees based on age, enter an Age range. You can also use this option in combination with Male/Female and Association. So if you wanted to limit the list to boys ages 6 – 8, you could check male, and enter an age range of 6 – 8.

Press CONTINUE to get your list of potential enrollees. Mark the box to Select All if you want everyone in the list to be enrolled in the group. Or, highlight each person you want enrolled. To highlight multiple people, hold down the Apple/CMD key on the Mac, or the CTRL key on Windows.

Select using query editor

If there is different criteria you’d like to use to determine potential enrollees, you can use the query editor to get that list. For this example let’s say we want a list of those people that live in a certain city. From this window, click the QUERY EDITOR button. The query editor will be displayed.

1. Change the Query In field to Address.
2. Select City from the **Field Name** drop down box.
3. Highlight “is equal to” in the **Comparison** box.
4. Enter the name of the city in the **Value** field.
5. Click on the **QUERY** button.

A list of people that live in that city will be displayed. Mark the box to Select All if you want everyone in the list to be enrolled in the group. Or, highlight each person you want enrolled. To highlight multiple people, hold down the Apple/CMD key on the Mac, or the CTRL key on Windows.

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From within the group you wish to enroll people into, select the Mass Enroll option under Utilities.

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Use this window to build the list of possible enrollee’s into this group. Choose associations, gender or age ranges that should be included in the list.

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Highlight all the people you’d like to enroll in the group. Click **ENROLL SELECTED**.
ADDING PEOPLE INFORMATION

Import People Information

When you begin using Roll Call, you may wish to import your existing contacts into the database. Roll Call allows you to import people contact information and some custom fields from a tab delimited text file. If you have the information in Excel, you can create the tab delimited file, by saving as “tab delimited text file”.

There are four file variations that can be used for the import:

One Row per Family (standard)
This format assumes that all the information on a single line is for one family. The data must be in the following order:
1. Family Last Name
2. Head’s First Name
3. Gender
4. Association
5. Cell Phone
6. Work Phone
7. Email
8. Spouse Last Name
9. Spouse First Name
10. Spouse Gender
11. Spouse Cell
12. Spouse Work Phone
13. Spouse Email
14. Home Phone 1
15. Home Phone 2
16. Address 1
17. Address 2
18. City
19. State
20. Postal Code
21. Child 1 First Name
22. Child 1 Gender
23. Child 1 Birth date
24. Child 2 First Name
25. Child 2 Gender
26. Child 2 Birth date
27. Child 3 First Name
28. Child 3 Gender
29. Child 3 Birth date
30. Child 4 First Name
31. Child 4 Gender
32. Child 4 Birth date
33. Child 5 First Name
34. Child 5 Gender
35. Child 5 Birth date
One Row per Family (custom)

This format allows you to import the same information, names, children, address, city state, zip, gender and birth dates, but the order does not have to be exact. For example if you don’t have a second home phone, you don’t need to leave a blank column for that field. You will be able to tell Roll Call which data is in which column.

One Row per Person (standard)

In the one row per person format, each row in the spreadsheet represents an individual. Roll Call will pull people together based on matches in the address field. The first person it encounters with an address will be marked as the head of family.

This file type requires the data to be in this exact order. If you do not have data for a column, leave that column blank.

1. Title (ex. Mr., Mrs., Rev etc.)
2. Last Name
3. First Name
4. Nick Name
5. Suffix (ex. Jr., Sr.)
6. Gender (Male or Female)
7. Family Position (Husband, Wife, Youth, Child, Adult or Other)
8. Marital Status
9. Association (ex. Member, Regular Attender, Visitor)
10. Email
11. Home Phone 1
12. Home Phone 2
13. Address 1
14. Address 2
15. City
16. State (2 character abbreviation)
17. Postal Code
18. Birth Date
19. Cell Phone
20. Work Phone

One Row per Person (custom)

In the one row per person format, each row in the spreadsheet represents an individual. Roll Call will pull people together based on matches in the address field. The first person it encounters with an address will be marked as the head of family.

In the custom format, the columns can be in any order you choose. This format also allows you to import custom fields. As part of the import process you will be able to define which data belongs to which fields.

Import Process

Once you have created the file that will be imported, do the following to bring the data into Roll Call.

1. Expand the People menu on the left side.
2. Click on Import People (You can also select File>Import People from the top menu).
3. From the window that is displayed, select your file format type, click NEXT.
4. From this window, select your default Association and default Family Position. These fields are required, so if you don’t have a value in the record, Roll Call will use the default value to create the record in Roll Call.
5. Indicate which row the data starts. For example if you have titles in row 1, the data would start on line 2.
6. Click LOAD FILE. Navigate to your text file and open it. Your data will be displayed in a spreadsheet fashion in the lower section of the window.

7. If you selected a custom file format, you will need to use the drop down box at the top of each column to define the data represented in that column. If you do not want to import the data in a column, leave the selection as SKIP.
Enter a new Family

To enter people information into Roll Call using the Add Person screen you can do either of the following:

1. From the Search Profiles (under People), click on the plus (+) sign in the lower left.
2. OR, Open up the People menu (left sidebar) and click Add a Family.

You are now in the Add Person screen. If you are entering a new family, enter the person who will be marked as Head of Family first. When you first come into the form, you’ll be in the Family Position field. Based on your selection here, the Title, Gender and Marital Status will automatically be filled in.

Once you enter family position, the title, gender and marital status will be filled in for you.

Enter name and contact information.
**Contact Information**
Once you’ve entered the Family Position, you can tab through each of the fields on this main page. Enter the following information:

1. *First Name* - enter the person’s full first name.
2. *Nickname* - the nickname will default to the value entered for the first name. You can change this to the nickname if it is different than the first name.
3. *Middle Name* – enter the middle name. This field is not required.
4. *Last Name* – enter the last name. This field is required. If you are entering a business, enter the business name in the last name field.
5. *Suffix* - enter the suffix Jr., Sr., etc if applicable.
6. *Spouse* - if the person you are entering is married, you can enter the spouse’s name here.
7. *Association* – enter how this person is involved in the church. Are they a Member, Regular Attender, Visitor, etc.
8. *Birth Date* - enter the full birth date for the person.
9. *Primary & Alt Phones* - enter the phone numbers for the family here.
10. *Unlisted* - if the family doesn’t want their phone numbers listed in directory check here.
11. *Head of Family* – this box will be checked for the head of family. Each family needs one and only one head.
12. *Exclude from Directory* - mark this box if the family should not be included in any directories.
13. *Personal Email* – an email address for this person.
15. *Envelope Number* – you may enter an envelope numbers here, or use the assign envelope number option under the Bulk Changes menu to assign numbers en masse.
16. *Family Number* – if you selected “automatic” from preferences, this number will be assigned by Roll Call. Otherwise, you may assign a family number manually.
17. *Badge No.* - if the family position is child, a badge number will be assigned. You may enter a different number if you’d like.
18. *Barcode No.* – the barcode number is used to identify individuals and families for child check-in. This number is automatically assigned by Roll Call, unless you have the preference set to manually assign the number.

**Address**
Next, we’ll move down to the address/pictures tab on the People screen. Notice there are three tabs underneath Address. You can now click on the tab to enter Primary Address, Alternate Address and Notes. The Primary address is the families main address. The Alternate address is for folks who live in a different part of the country for part of the year. The notes section can be used to enter driving directions.

Enter the following information on the Primary address tab:

1. *Optional Mailing Name* - The name entered here will be used as the mailing name on all correspondence and labels. For example, if you have a husband and wife Jim & Sue Smith, the default mailing label would be Jim & Sue Smith OR Mr. & Mrs. Smith. However, if you entered “The Smith Family” as the optional mailing name, the letters, labels and receipts would be addressed to “The Smith Family”.
2. *Address, City, State and Zip*.
3. *Country* – if you have the preference turned on for country there will be a country field displayed here.
4. *Shepherd Area* – if your church assigns deacons, congregational care pastors or other lay people to come along side families, you may indicate that here.
5. **Family Email** – an email address that can be used to send emails to the entire family.
6. **Bad Address** – if you’ve had mail returned, so you know it is an invalid mailing address, you can mark the box for “bad address”.
7. **Do not send mail** – if someone has requested that you not send them mail, mark this box.
8. **Unlisted Address** – if someone has requested that their address is not published, mark this box.

**Pictures**

You can pull in family pictures and/or individual pictures into Roll Call. Click on the Address/Pictures tab. Notice the two tabs on the right side for Picture and Family Picture.

The individual picture should be a portrait picture. To pull in the individual picture do the following:
1. Make sure you are anchored on the Picture tab (click on the word Picture).
2. Click on the plus sign (+) in the lower left.
3. Navigate to your image file and click OPEN.

The family picture should be in landscape. To pull in the family picture do the following:
1. Make sure you are anchored on the Family Picture tab (click on the word Family Picture).
2. Click on the plus sign (+) in the lower left.
3. Navigate to your image file and click OPEN.

**Phones**

To enter an individual’s phone numbers, click on the Phones tab. Enter the following information:
1. **Work Phone & Extension** – enter the person’s work number.
2. **Cell Phone** – enter the cell phone number for this person. If you wish to send texts, you’ll also need to enter the carrier information.
3. **Pager** – enter a pager number for this person if they have one.
4. **Fax** – enter a fax number for this individual.
If an individual has multiple cell numbers or emergency numbers or additional phone numbers you’d like to record, use the Additional Phones section to enter these numbers. To enter these numbers, do the following:
1. Click the plus sign (+) in the lower left.
2. Enter the Phone Number.
3. Enter an Extension if applicable.
4. Select the Description of the phone from the drop down, or enter a new one. For
USING BAR CODES

Bar Code Font
To print the bar code font on badges or sign in rosters, you’ll need to move the font file into your system font folder.

Windows
If you are using a windows standalone installation, you’ll want to copy the font file (IDAutomation) from C:\BytheBook\RollCall\BarCode to your C:\Windows\Font folder.

If you are using Roll Call on Windows as part of a network installation, you’ll need to copy the font file (IDAutomation) from C:\BytheBook\RollCall_Client\BarCode to C:\Windows\Font folder.

Mac
If you are using a OSX standalone installation, you’ll want to copy the font file (IDAutomation) from Applications:RollCall:Barcode to your HD:Library:Fonts folder.

If you are using Roll Call on Mac as part of a network installation, you’ll need to copy the font file (IDAutomation) from Applications:RollCall:Barcode to your HD:Library:Fonts folder.

Bar Code Options

Bar Code Badge
One option for checking in students, is to create bar code badges. These badges are produced using Roll Call. The badges are printed 8 or 10 per page using Avery business card stock. They can be printed then laminated or placed in name tag holders. The badges are printed with a bar code which identifies the student. They can also include your church logo, the student’s picture, family number or badge number, allergy information and the parent’s names.
Key Tag
Another option is to have key chain tags printed with a bar code to identify the student.

Bar Code Roster
Another possible method for checking students in is by bar code roster. Instead of swiping a badge or entering a name, the person manning the check in station can find the students name on the roster and scan it.

Bar Code Badge
To print the badges:
1. Expand the People menu.
2. Click on Print Badges.
3. Select the “Run For” criteria. Do you want to print these badges for people in certain groups, associations, shepherd areas, etc.?
4. Once you’ve chosen your “run for” criteria, select the specific groups, associations or shepherd area values. Click on the value on the left side to move it to the “Selected” column.
5. Click GENERATE.
6. You are now in the Badge wizard. Select the option for 8 or 10 per page. Also choose if you want an individual badge or a family badge. The individual badge will include the individual picture, and allergy information. The family badge will include the family members names and the family picture.
7. Click NEXT.

8. From this window, choose the security number you’d like printed on the badge. Also choose a logo to print on the badge. Finally choose the picture you’d like printed on the badge.
9. Click NEXT to view all the people that a badge will be printed for.

10. Click FINISH to send the badges to the printer.

Example of the family badge.

**Evans**
Ricky & Betty
- Family Number: 0
- Hailey
- James
- Shane
- Robby

**My Church**

**Crumb**
David & Nicki
- Family Number: 0
- Melissa
- Michael
- Jacquelyn
- Michaela
- Quentin

Choose family or individual badge
Choose the number of labels printed per page.
Choose what you’d like included on the badge.
Key tags

Order tags
You may order tags from us or from a different printer. If you order the tags from us you’ll need to download the key tag template. We have several shapes and sizes available. Open that template in your graphics program and place your logo on top of the template. If you wish to have color all the way to the edge of the tag, make sure to include a 1/8 inch bleed. Also, your logo graphic must be a high resolution graphic at least 300 dpi. Export this to a pdf and email to us at info@bythebook.com.

If you decide to order from a different printer, here are the specifications for the bar code number:
1. Must use a code 39 font.
2. The number must end with a Q.
3. There must be start and stop characters surrounding the number.

Assign key tag numbers
Next, you’ll need to assign the key tag number to a person in Roll Call. This can be done under Check In/Out setup. Click on the Key tag graphic. Highlight the existing code for the person you wish to assign a key tag. Scan the key tag to assign the new number.

Bar Code Roster
The bar code roster can be printed from the Group Reports screen.
1. Expand the Groups menu.
2. Click on Reports.
3. Click on “Sign in Roster” on the left side list of reports.
4. Click over all the groups that you’d like to run this for.
5. Click on the Criteria tab. Select the fields you’d like displayed on the roster. Make sure to include bar code.
6. Click GENERATE to send the roster to the printer.
From group reports, select Sign in Roster.

Click on the Criteria tab.

Choose the fields you’d like included.

Click GENERATE.

Select the appropriate groups.
USING FINGERPRINTS

Fingerprint Technology Configuration
To identify and check children in using finger prints, you will need to install the M2SYS Server and Client software on Windows machines (2003 Server, Windows XP, Vista, or Windows 7). The installation instructions for this software can be found on your installation CD or at www.M2SYS.com.

The fingerprint scanner must be plugged into a USB port on the client machines.

Fingerprint Set Up with Roll Call
The first step is to set up the BioPlugin Adapter settings on each of the client machines. Double click on the BioPlugin Adapter icon. From the finger print window, click on the SETTINGS button.

From the General tab, you’ll need to enter the IP address and port number of the Biometric Server. This information can be found in the Control Panel under Biometric Server.
From the Interface tab, you’ll need to indicate this is a Keyboard Interface.

Click Interface tab. Select Keyboard interface.

From the Destination Windows tab, you’ll need to indicate that you are connecting to Roll Call. If you are using a single check in station, the Window Title is “Roll Call”. If you have multiple check in stations and are using a network version of Roll Call, the Window Title is also “Roll Call”. Enter rollcall as the Keystroke Destination. Make sure the suffix is set to p{enter}

Connect a Fingerprint with a Person in Roll Call

When a person arrives to check in, you’ll need to first identify that person in Roll Call. Click on the FIND BY NAME button and click on the specific individual. From the Automated Attendance window, note this person’s ID in the upper right corner.

Next, bring up the Biometric SnapOn Adapter. Click on the FINGERPRINT ADMINISTRATION button to enter this person’s Roll Call ID and scan their fingerprint.
Note the ID for this person.

Click on FINGERPRINT ADMIN to record Roll Call ID and scan fingerprint.

From the Fingerprint Admin window, enter the person’s ID number, then click on the REGISTER A NEW PRINT button.

Enter the ID from the Roll Call checkin screen.
The next screen allows you to scan the individual's fingerprint. Make sure you set a standard for which finger and on which hand will be scanned. Click on the right side to capture the fingerprint. Have the student place their finger on the scanner. They will need to scan their print three times. A message will come up indicating a successful scan.
OPERATING THE CHECK IN STATIONS

Log into the Check In Station

To use the check in functionality of Roll Call, you need to log on with a user name that is a “check in” type user. To start Roll Call, double click on the Roll Call icon. The Login window is displayed. If you do not get the Login screen, that means the security system is not activated. You’ll need to give the Director user a password. See the chapter on “Configuring Roll Call for Check In/Out”.

From this log in screen, choose the user and enter password.

If you are already logged into Roll Call, but are in the back end of the program where you look up people and groups, you can get into the Check In portion, by expanding the check in menu, then selecting Launch. This will bring you to the Login window so you can login as a check in user.

Click Launch under the checkin/out menu to get to the Login screen. Sign in as check in user.

Once you log in, you’ll be taken to the check in screen. This screen can look different depending on the type of check in user you’ve signed in as. These options are discussed more in the chapter on “Configuring Roll Call for Check In/Out”.

Here’s an example of a manned check in station. This station can be used to check in with a scan or a search by name. It can also be used to check in visitors.
Here’s an example of an unmanned touch screen station that allows check in by a scan or by a search of phone number.

This screen can accept a scan or entry of the last 4 digits of the phone.

Note the ADD VISITOR button is not displayed.

This is an example of a manned touch screen user, searching by name and returning lists of families. You can also do a scan from this station as well.
Check In Using a Last Name

To check a student in, based on their last name, type the last name. You can also type the first few characters of the last name. Press the enter key or press the SEARCH button. This can be done with a keyboard or with the virtual keyboard on a touch screen monitor.

If return by family is selected, a list of families with that last name is presented. If there are multiple people displayed in the upper right of the window, “return by family” is selected. If only one person is displayed, “return by individual” is selected. If return by individual is selected, a list of individuals with that last name will be presented. Highlight the family that is present to check in. Press the NEXT button. A list of family

Lists the families where the last name is Smith.

If “return by individual” was selected, you would get a list like this. All individuals with that last name are displayed.
members is presented. Highlight the students that are there to check in. Note the “List only Children” check box in the lower left of this window. Mark this box if you are only checking in children. Press the NEXT button to check them in.

If “return by individual” is selected, a list of people with that last name will be displayed. Highlight the students that are present to check in. Note the “List only Children” check box in the lower left of this window. Mark this box if you are only checking in children. Press the NEXT button to check them in.

Highlight the students that are present to check in.

Click NEXT.

The next window is the confirmation screen. This window will display the individual’s picture if available. It will also display the groups, classes, events that they are enrolled in, that are available for check in. Highlight the class they are checking into and click CHECK-IN to complete the check in process.

Highlight the class she is checking into, then click CHECK IN.

Click WHAT’S MEETING to see all classes meeting at this time.

If the student is not enrolled in the class they wish to attend, you may press the WHAT’S MEETING button, to check them into a different class. Once you press the WHAT’S MEETING button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend, and press CHECK-IN.
To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person’s record. The notes are not stored. They are meant for one-time instructions. Both pieces of information can be printed on the name tag label.

**Check In Using a Phone Number**

To check a student in based on the last 4 digits of their phone number, enter that number using the keyboard or numeric keypad on the touch screen monitor. Then press the enter key or press the SEARCH button. The system will search for any families or individuals that have a home, cell or work number that end in those 4 digits.

If “return by family” is selected, a list of families that meet that phone number criteria will be presented. If there are multiple people shown in the upper right of the window, “return by family” is selected.

Highlight the family that is present to check in. Press the NEXT button. A list of family members is presented. Highlight the students that are present to check in. Note the “List only Children” check box in the lower left of this window. Mark this box if you are only checking in children. This will limit your list to only children. Press the NEXT button to check them in.

If “return by individual” is selected, a list of people that meet that phone number criteria will be displayed. Highlight the students that are present to check in. Press the NEXT button to check them in.
List of individuals associated with that phone number.

The next window is the Confirmation screen. This window will display the individual’s picture if available. It will also display the groups, classes, events that they are enrolled in that are available for check in. Highlight the class they are checking into and click CHECK-IN to complete the check in process.

Highlight the class and click CHECK-IN.

Click WHAT’S MEETING to check into a different class.

If the student is not enrolled in the class they wish to attend, you may press the WHAT’S MEETING button, to check them into a different class. Once you press the WHAT’S MEETING button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend, and press CHECK-IN.

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person’s record. The notes are not stored. They are meant for one-time instructions. Both pieces of information will be printed on the name tag label.

Enter allergy or note information.
Check In Using a Family Number

To check a student in based on the family number, enter that number using the keyboard or numeric keypad on the touch screen. Press the enter key or press the SEARCH button.

If you are checking in based on family number, “return by individual” should be selected. It doesn’t make sense to return a list of families since only one family would be displayed. If “return by family” is selected, you can change that by selecting Administration (on the top menu) and choosing “return by individual”.

Enter family number, then click SEARCH.

Make sure to have “by individual” selected.

List of people in family number 100 are returned.

Highlight and click NEXT.

When “return by individual” is selected, a list of people with that family number will be displayed. Highlight the students that are present to check in. Note the “List only Children” check box in the lower left of this window. Mark this box to limit your list to only children. Press the NEXT button to check them in.

The next window is the Confirmation screen. This window will display the individual’s picture if available. It will also display the groups, classes, events that they are enrolled in that are available for check in. Highlight the class they are checking into and click CHECK-IN to complete the check in process.

If the student is not enrolled in the class they wish to attend, you may press the WHAT’S MEETING button, to check them into a different class. Once you press the WHAT’S MEETING button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend and press CHECK-IN.
Highlight class and click CHECK-IN to complete the check in.

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person’s record. The notes are not stored. They are meant for one-time instructions. Both pieces of information can be printed on the name tag label.

**Check in Using a Bar Code**

From the check in screen, scan the bar code from the badge, roster or key chain tag. If “return by family” is selected a list of all the family members associated with this bar code number will be displayed. You can easily tell if return by family is selected by looking at the picture in the upper right of the window. If there are multiple people displayed, “return by family” is selected.
From the list of family members, highlight the students that are present to check in. Press NEXT. The next window is the Confirmation screen. This window will display the individual’s picture if available. It will also display the groups, classes, events that they are enrolled in that are available for check in. Highlight the class they are checking into and click CHECK-IN to complete the check in process for that student.

If the “return by individual” is selected (only one person will be displayed in the upper right), the bar code scan will take you immediately to the Confirmation screen for the individual associated with that bar code number. Highlight the class they are there to attend, then click CHECK-IN.

If the student is not enrolled in the class they wish to attend, you may press the WHAT’S MEETING button to check them into a different class. Once you press the WHAT’S MEETING button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend, and press CHECK-IN.

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person’s record. The notes are not stored. They are meant for one-time instructions. Both pieces of information will be printed on the name tag label.
Check In with Rapid Check In

To use the “rapid check in” feature, the check in user must have “rapid check in” marked as an option. For more information on setting up users, see the “Configuring Roll Call for Check In” chapter of this manual.

The rapid check in feature will automatically check a student into his class if he is only enrolled in one class for the current check in period. Once you highlight his name, and press NEXT, the attendance is recorded for that class and labels will automatically be printed.

If there are two classes available for the student to check into, the Confirmation screen will be displayed. If the student is not enrolled in any classes meeting at the current time, the Confirmation screen will be displayed, even though the user is rapid check in.

By using the “rapid check in” feature, you do loose the ability to enter allergy or notes information during the check in process.

Check In Using a Touch Screen

To check in using a touch screen monitor, you’ll need to sign in using a check in user that has “touch screen” marked. For more information on setting up users, see the “Configuring Roll Call for Check In” chapter of this manual.

When you sign in as a check in user with the touch screen option, a virtual keyboard will be displayed on the screen. This allows the user to enter a name or number using just the screen. Once they enter the criteria, they can press the SEARCH button on the screen instead of using the mouse. Once the lists are displayed, the user simply highlights by using their finger on the screen to highlight names.

Check In Using a Finger Print

From the check in screen, scan the fingerprint. If “return by family” is selected a list of all the family members associated with fingerprint will be displayed. You can easily tell if return by family is selected by looking at the picture in the upper right of the window. If there are multiple people displayed, “return by family” is selected.
From the list of family members, highlight the students that are present to check in. Press NEXT. The next window is the Confirmation screen. This window will display the individual’s picture if available. It will also display the groups, classes, events that they are enrolled in that are available for check in. Highlight the class they are checking into and click CHECK-IN to complete the check in process for that student.

If the “return by individual” is selected (only one person will be displayed in the upper right), the fingerprint scan will take you immediately to the Confirmation screen for the individual associated with that fingerprint. Highlight the class they are there to attend, then click CHECK-IN.

If the student is not enrolled in the class they wish to attend, you may press the WHAT’S MEETING button, to check them into a different class. Once you press the WHAT’S MEETING button, all classes that are meeting at the current time will be displayed. Highlight the one they wish to attend, and press CHECK-IN.

To enter one time instructions or allergy information, press the ALLERGY/NOTES button. A window will be displayed to enter this information. The allergy information will be stored in the person’s record. The notes are not stored. They are meant for one-time instructions. Both pieces of information can be printed on the name tag label.
Check into Multiple Classes

You can certainly check an individual into multiple classes at once. For example, if you had Sunday school at 9:30 and then Children’s Church at 11:00. When the child arrives at 9:20 and they’ll be going to both classes, you can check them into both at the same time.

The first step is to make sure both classes will show up in the Confirmation screen. You will need to set the check in start preferences to say 120 minutes before the class starts. This will allow both the 9:30 and 11:00 classes to show up at 9:00.

Next, you will need to identify the person that is there to check in. You can use the bar code scan, search by name, phone or family number methods described above. Highlight the students that are present to check in. Click NEXT. From the Confirmation screen, highlight both classes and click CHECK-IN. The child is now checked in to both Sunday school and Children’s Church.

Check in a New Person into an Existing Family

To check in a person who is not in the database, but their family is in the database, do the following:
1. Search by name or phone number to find the appropriate family.
2. Highlight the appropriate family and click NEXT.
3. Click on the ADD TO EXISTING FAMILY button.
4. Enter the information for the new student.

This is also a great way to check in a visitor that is coming with an existing family.
From the results of your family search, highlight the appropriate family.

Click NEXT.

Click ADD TO EXISTING to add a member to this family. Or if this family brought a visitor, you can add the visitor here.

Note the Smith family information is displayed for us here.

We can add up to 4 new children to this family.

Click OK to proceed with the check in.
Check in Visitors

To check visitors into a class or group, click on the ADD VISITOR button. Select an association of Visitor. Next enter the address and phone information if you’d like. Next enter the Mom and Dad’s information if you’d like to capture that. In the lower section enter the children’s names. You can enter up to four children through this ADD VISITOR. Click OK to save this information.

Now you will be at the screen to highlight those that are present to check in.

Click on ADD VISITOR to ADD VISITORS.

Enter address information if you’d like.

Enter mom and dads info, if you’d like.

At a minimum, enter all the children’s names.

Highlight the children present to be checked in.

Click NEXT.
Click WHAT’S MEETING.

Highlight the appropriate class for this child, then press CHECK-IN.

At the Confirmation screen you will need to click on WHAT’S MEETING button. This will display all classes that are available for check in. Highlight the class you’d like to check this visitor into. Click on ALLERGY/NOTES to enter allergy or one time note information for the name tag. Once you click CHECK-IN the labels will be printed.

**Check into Services**

You can set Roll Call up so that you can check people into worship services. First you’ll need to define the Service. To do this expand the Service menu and click Add Service. Enter the following information:

1. **Name** – Give the service a name.
2. **Day** – Select the day of the week this service meets.
3. **Start Time** – Enter the start time of the service.
4. **End Time** – Enter the ending time of the service.
5. **Check in** – Mark this box to allow automated check in to this service.
6. **Labels** – Indicate if you want name tags printed when someone checks into this service.
7. **Associations** – Enter the association of people that can check into this service.
8. Click **SAVE & CLOSE** to save this service.
Check into the service, the same manner you would check into a class.

Once you have the services set up for check in, you can check people into those services using any of the methods listed above.

**Determine Headcounts**

To determine how many children are checked into each class, use the dashboard tab on the check in station. If you do not see the dashboard tab, it means the check in user that you are logged on as, does not have “dashboard” privileges. See the chapter on “Configuring Roll Call for Check In/Out”.

The dashboard will list all the classes/events that have been checked into with the associated headcounts.

- **All classes listed with headcount information.**
- **Listing of all who are checked into First Grade.**
- **Click DETAILS to see who is checked into that class.**
Check Out

Compare tags
One method of checking the students out is to compare the security number on the child’s name tag with the security number on the parent tag. If the numbers match the teacher can release the child.

Using this method, you will want to make sure to have policies in place to handle the circumstance where a parent looses the parent tag.

Using Roll Call
You can also check students out through the Roll Call system. When they are logged out, the out time is recorded and any custody comments are displayed on the screen.

To log a student out:
1. Log onto Roll Call as a check in user that has “check out” privileges.
2. Identify the student that is checking out by scan or by searching name, phone or family number.
3. Highlight the appropriate name.
4. Highlight the class they are checking out of.
5. Click CHECK OUT.
Check in Roster

You can print a check in roster from the check in screen. The check in roster is a report for each class. It lists all the students that are checked in, their parents name, allergy and note information, security number and birthday.

You must be logged in as a check in user that is not a “self check in” user. Select Administration>Check In Roster from the top menu. Highlight the classes that you want to print a roster for. You’ll need to have access to a printer other than the Dymo to print this report.
USING MOBILE CHECKIN

Roll Call Mobile CheckIn is an add-on component to the Roll Call software package. It allows you to check in students or adults using an iPad, iPod touch, tablet or a smartphone that has access to the Internet or wireless connection to your local area network.

When you use a mobile device to check students in, the name tags and security tags can be printed in the following manner:

1. From a Dymo printer connected to a computer with Roll Call running as the Print Queue user.
2. From a Brother wireless printer defined on a computer that is logged into Roll Call.

Getting Started

Mobile CheckIn Trial

We offer a 30 day trial of Mobile CheckIn, if you would like to give it a test drive. You will need to activate your trial by doing the following:

1. Login to Roll Call as Administrator or Director
2. Select File>Enter License from the top menu
3. Click on the Mobile CheckIn tab
4. Click on the TRY IT button
5. Restart Roll Call

Enter License Number

If you’ve purchased a license for the Mobile CheckIn component, you’ll need to enter your license number to begin using it. To do this:

1. Login as Administrator or Director
2. Select File>Enter License from the top menu
3. Click on the Mobile CheckIn tab
4. Enter the License Number
5. Click OK

Logging in with your Mobile Device

Roll Call Configuration

You can run Mobile CheckIn with Roll Call standalone or the network version of Roll Call.

Mobile Device on Same Network

If you are running your mobile devices off the same network as your Roll Call system, you will need to determine the IP address of Roll Call Server. If you look on the Server dashboard, the IP address is displayed for you. It would be best to configure this machine to have a fixed IP address, so that address does not change from week to week. This is discussed further in our white paper on Internet port forwarding [http://www.bythebook.com/dmdocuments/PortForwarding.pdf](http://www.bythebook.com/dmdocuments/PortForwarding.pdf)
If you are running Roll Call standalone, you will need to determine the IP address of that machine. On the Mac, go to the Apple and select System Preferences, then Network. This window will show you the IP address. On Windows, go to the Start menu in the lower left of your screen. In the Search box, type in CMD, select the CMD under Programs. In the Window that pops up, type in “ipconfig” and press return. This will give you your IP address.

Once you know the IP Address, you’ll use that as the web address in your browser. Open your browser and enter [http://enter-ip-here](http://enter-ip-here). If you do not have a fixed IP address this number could change each week. If you do have a fixed IP address you can create web app icon on your home screen. To do this:

1. Tap the share button
2. Tap the icon labeled add to home screen
3. Name the web app icon
Enter the name you’d like to use for the web app icon.

Login Screen
You are now at the log in screen for the Mobile Check In system. Select the appropriate user name. Make sure that each device logs in with a different user name. Enter the password. Click LOGIN.

Mobile Device on Different Network
If you are checking in from a remote location and are using a 3G network, you will need to create a fixed IP address for your Roll Call. A good example of this would be a bus ministry where you’d have the bus driver check the students in before they get to church.

Creating a fixed IP is discussed further in our white paper on internet port forwarding, http://www.bythebook.com/dmdocuments/PortForwarding.pdf

To log in, open your browser and enter http://enter-ip-here. Since you have a fixed ip address you can create an icon for this web page on your home screen. To do this:
1. Tap the share button
2. Tap the icon labeled add to home screen
3. Name the web app
Checking in Using Last Name or Phone Number

Once you’ve logged in, you’ll see two tabs: dashboard and check in. Click on the Check In tab. Next, select by Name or by Phone. To check someone in:

1. Touch the field to get the keypad.
2. Enter the last name or last 4 digits of the phone number of the family who is present to check in.
3. Touch SEARCH.

4. A list of families with that last name will be presented.
5. Tap on the appropriate family.
6. A list of each individual in that family will be presented.
7. Tap each person that needs to check in.
8. Click NEXT.
Select the children that will be checking in.

Select the class this student will be attending.

9. Now you are at the confirmation screen for the first family member checking in.
10. Mark the class or classes they are checking into, click CHECKIN.
11. The confirmation screen for the next family member will be displayed. Continue this process until all family members are checked in.
12. Once each family member is checked in, the name tags will be printed at the centralized print queue station.

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Checking in by Group or Service

Checking in by Group or Service is a great way to record real-time attendance. Please note that name tags are not printed using this method. When you choose “by Group”, you’ll be presented with a list of students enrolled in the group/class. You highlight the students as they arrive and click CHECKIN. Attendance is now recorded for those students.

Once you’ve logged in, you’ll see two tabs: dashboard and check in. Click on the Check In tab. Next, make sure to select “by Group” from the drop down.

1. Touch the Group you’ll be checking kids into.
2. Highlight one or more students, then click CHECKIN.
3. Repeat as needed.
Select “by Group” from the drop down, then tap the group you’ll be recording attendance for.

Tap one or more students then click CHECKIN.

Click CHECKIN.

Checking in by Keyword

Checking in by Keyword is a great way to handle check in for a Bus Ministry. You can create a keyword for each Bus Route, and assign that keyword to each child that is on a specific bus. Then the bus driver can have an iPad with 3G, and check students in as they get on the bus. When they arrive at church, their name tags will be ready for them.

Once you’ve logged in, you’ll see two tabs: dashboard and check in. Click on the Check In tab. Next, make sure to select “by Keyword” from the drop down.

1. Touch the Keyword for the particular bus route.
2. Highlight one or more students, then click NEXT.
3. You are now at the confirmation screen for the first highlighted child.
4. Mark the class or classes they are checking into, click CHECKIN.
5. The confirmation screen for the next student will be displayed.
6. Name tags are printed at the church, if you’ve selected to print tags.
When you select “by Keyword” from the drop down, you’ll get a list of the keywords in your system.

Click on the appropriate keyword.

Tap on the students you wish to check in, click NEXT.

Choose the class they will be attending, click CHECKIN.

Click CHECKIN.
Check in Visitors

To check visitors into a class or group, click on the ADD VISITOR button. Select an association of Visitor. Next enter the address and phone information if you’d like. Next enter the Mom and Dad’s information if you’d like to capture that. In the lower section enter the children’s names. You can enter up to four children through this screen. Click OK to save this information.

Enter as little or as much information as your church wants to capture. At a minimum, enter the children’s names.

The visitor family members are now listed. Tap on the students that will be checking in.

Click NEXT.

Click OK to save this information and continue in the check in process.
Printing Name Tags and Parent Tags on a Dymo

Once a family has checked into their classes, the name tags will be printed at the computer where you have logged onto Roll Call as the print queue user. You can have as many of these print queue stations logged in as you’d like.

When you log in as the print queue user, you will see the print queue status for today. Each family will be listed and the status of the labels will be listed on the right.

If you should need to reprint, simply highlight the family name and click REPRINT. The name tags and security tag will be re-printed.

You may also print Check In Rosters from this user. Select Admin>Check In Roster from the top menu. Highlight the classes you’d like to have rosters for, click PRINT.

Printing Tags on a Brother Wireless Printer

If you are using the Brother wireless label printer, you will need be logged onto Roll Call from a computer that has the printer definition for that printer. Once a family has checked into their classes, the name tags will be printed on the Printer that was defined for the specific Mobile check in user.

For example, let’s say we want to use an iPad to check folks in “downstairs” and we want the tags to print off on the wireless printer that is also “downstairs”. You would create a print queue user that is defined as the “downstairs” printer. Then you would create a Mobile CheckIn user for “Downstairs” that is connected to the “downstairs” print queue.
Using the Dashboard

When you click on the Dashboard tab, you will see a list of all the classes that someone has checked into today. The head count and visitor counts for each class are listed on the right.

Click on the class name to view a list of the people that have checked into that class. Once a family has checked into their classes, the name tags will be printed at the computer where you have logged onto Roll Call as the print queue user. You can have as many of these print queue stations logged in as you’d like.
ATTENDANCE REPORTS

Attendance Summary

The attendance summary report gives head count information for service and group attendance information. The Attendance Summary by Day lists the group or service, the meeting date, the number of people enrolled if the attendance is for a group, the number of visitors (people with the association of visitor) that attended, the head count and the number of people that attended. For a specific class/service and day the head count and number of people will be the same. However, on the summary lines, the number of people represents the number of “unique” people that attended those classes. So if someone attended 2 classes and a worship service, they would only be counted once.

The Attendance Summary can also be run by week, month or year. When running for this time frame, it will display the head count.

To run the attendance summary report by day:
1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Attendance Summary.
4. Enter the date range for the attendance data you are interested in.
5. Select “By Day” as the report type.
6. Choose which attendance you want to run this for. You may select All and it will list all worship service attendance as well as all group attendance for the date range you entered. You may select Service, and then choose which services you’d like to see or you may choose groups, then pick the specific groups you’d like included in the report.
7. Click GENERATE to run the report.
To run the Attendance Summary report by week, month or year:
1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Attendance Summary.
4. Enter the date range for the attendance data you are interested in.
5. Select by week, by month or by year as the report type.
6. Choose which attendance you want to run this for. You may select All and it will list all worship service attendance as well as all group attendance for the date range you entered. You may select Service, and then choose which services you’d like to see or you may choose groups, then pick the specific groups you’d like included in the report.
7. Click GENERATE to run the report.

Since we selected all, the small group and worship services are included also.
Note each of the classes I chose is listed. The head count for the entire week is listed.

Attendance by Person

The attendance by Person report outlines the different services or groups a person came to, if you run this report “by day”. If you run this report by week, month or year it will show you in a spreadsheet format how many times they attended each week, month or year.

To run the attendance by person report by day:
1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Attendance by Person.
4. Enter the date range for the attendance data you are interested in.
5. Select “By Day” as the report type.
6. On the “Who” tab, select which people you want to run this for. You can choose by association, groups, keywords, shepherd areas or search the database. Once you choose your type, you can pick the specific values. For example, if you wanted to see all your Members and Regular Attenders, choose Associations, then click on Member and Regular Attender to select those values.
Highlight Attendance by Person.

Enter date range and select “by day” to get the detail attendance information.

In this example I choose groups, and picked several Sunday School classes.

Click on the Who tab. And choose which people you want included in the report.

Click to only show active groups in the list. Mark if you only want to see active members in the report.

Click on the “What” tab to choose which attendance you want to run this for. You may select All and it will list all worship service attendance as well as all group attendance for the date range you entered. You may select Service, and then choose which services you’d like to see, or you may choose groups then pick the specific groups you’d like included in the report.

Click on the “What” tab to choose the type of attendance data to include in the report.

In this example I’ve chosen to include attendance for the 1st grade - 6th grade classes.
8. Next click on the Columns tab to choose the information you wish to include on the report. Click on a column name from the left column and move it to the middle column.

9. Click on the View People tab, to review the people that will be included in the report.

10. Click GENERATE to run the report.
To run the by person report by week, month or year:
1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Attendance by Person.
4. Enter the date range for the attendance data you are interested in.
5. Select by week, by month or by year as the report type.
6. On the “Who” tab, select which people you want to run this for. You can choose by association, groups, keywords, shepherd areas or search the database. Once you choose your type, you can pick the specific values. For example, if you wanted to see all your Members and Regular Attenders, choose Associations, then click on Member and Regular Attender to select those values.

7. Next click on the “What” tab to choose which attendance you want to run this for. You may select All and it will list all worship service attendance as well as all group attendance for the date range you entered. You may select Service, and then choose which services you’d like to see or you may choose groups, then pick the specific groups you’d like included in the report.

8. Next click on the Columns tab to choose the information you wish to include on the report. Click on a column name from the left column and move it to the middle column.
9. Click on the View People tab, to review the people that will be included in the report.
10. Click GENERATE to run the report.
The report lists how many times a person came each month. The dash means there was no attendance for that month.

**Attendance by Type**

The Attendance by Type report will list all the people who came to a group or service on a specific day. This is a great report to run if you want to see who came to your Sunday School classes last weekend and who was absent. Or you can see who attended last Saturday nights service.

To create the Attendance by Type report, do the following:

1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Attendance by Type.
4. Enter the date range for the attendance data you are interested in.
5. Choose which attendance you want to run this for. You may select All and it will list all worship service attendance as well as all group attendance for the date range you entered. You may select Service, and then choose which services you’d like to see or you may choose groups, then pick the specific groups you’d like included in the report.
6. Click GENERATE to run the report.
Highlight Attendance by Type.

Select which type of attendance you are interested in. Select group, service or all.

Select the specific values based on the type of attendance you chose.

Click on the Columns tab to select additional data to be included on the report.

Double click or drag a field from left side to “Selected” column.

Click GENERATE to run the report.

Lists the class name.

Lists members present for the date.

Lists absent members.

Attendance by Session
The Attendance by Session report will list all the people who came to a specific group session or a specific service time on a specific day.

To create the Attendance by Session report, do the following:
1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Attendance by Session.
4. Enter the date range for the attendance data you are interested in.
5. Choose which attendance you want to run this for. You may select All and it will list all worship service attendance as well as all group attendance for the date range you entered. You may select Service, and then choose which services you’d like to see or you may choose groups, then pick the specific groups you’d like included in the report.
6. Click GENERATE to run the report.

The report lists the name of the group or service and the specific time.

All who attended at that time are listed.

Absent Present Report

The absent/present report allows you to find folks who have been absent so many weeks or who have attended so many times in a certain time frame.

To run the Absent/Present report:
1. Expand the Attendance menu.
2. Click on Reports.
3. Highlight Absent Present.
4. Enter the date range for the attendance data you wish to view.
5. On the “Who” tab, select the people to consider for the attendance report. You can choose by association, groups, keywords, shepherd areas or search the database. Once you choose your type, you can pick the specific values. For example, if you wanted to evaluate attendance for all your Members and Regular Attenders, choose Associations, then click on Member and Regular Attender.

Highlight the Absent/Present report.
Enter date range of attendance that will be included on report.

From the “who” tab, choose which people you’d like to consider for the report.
6. Next click on the “What” tab to choose which attendance you want to use in determining who was present or absent. You may select All and it will evaluate attendance for all services and groups. Select Services and choose the specific services to only look at attendance for those services. Select Groups to choose specific groups.

In determining if a person was absent or present, which attendance should be considered... All, specific groups or specific service attendance.

7. Click on the “When” tab to enter your absent present criteria. Enter how many weeks you wish to look back. Choose to find people who were absent or find people who were present. Enter how many times.

8. Next click on the Columns tab to choose the information you wish to include on the report. Click on a column name from the left column and move it to the middle column.

9. Click on the View People tab, to review the people that will be included in the report.

10. Click GENERATE to run the report.
Visitor Report

The Visitor report will list all your first time, second time, third time visitors, based on the association of visitor and the attendance data you wish to evaluate.

To create the Visitor report, do the following:
1. Expand the Attendance menu.
2. Click on Reports.
4. Enter week of attendance you are interested in looking at.
5. Choose the type of visitor you are looking for from the drop down under the Who tab.
   Then choose the association(s) you use to indicate a visitor.
6. Click on the “what” tab and indicate which type of attendance you wish to evaluate.
7. Click GENERATE to run the report.

Highlight Visitor report.

Choose the association your church uses for visitors.

Choose the type of attendance you wish to consider when determining if it was their 1st, 2nd or 3rd time visiting.

Choose the number of times visited.

Our list of 1st time visitors on the 15th.

Click GENERATE to run.

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