Approved Workman Database

a recordkeeping system for Awana clubs

Windows App Version 5.5

User Guide

AW Cloud Database - Windows App version 5.5

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Table of Contents

1 Welcome to the Windows App 8

2 Getting Started 10

2.1 Minimum System Requirements 10
2.2 Downloading the Windows App 10
2.3 Updating the Windows App 11
2.4 Contacting Customer Support 12

3 Logging into the Windows App 14

4 Learning the Basics 16

4.1 Customizing the Database 17
4.1.1 Screenshot Examples 18
4.2 Entering Clubbers and Leaders 20
4.2.1 Entering Contact Info 21
4.2.2 Setting Registration to Current 23
The Register and Post a Payment Dialog 23
The Registration Window Dialog 24
4.2.3 Assigning Handbooks 27
4.2.4 Assigning Uniforms 28
4.2.5 Assigning to a Team 29
4.2.6 Managing Member Photos 30
4.3 Basic Check-In 32
4.4 Adding a Visitor 33
4.5 Working with Dues 35
4.6 Working with Points 36
4.7 Working with Awards 37
4.8 Working with Grids 39
4.8.1 Sorting 39
4.8.2 Customizing Visible Columns 40
4.8.3 Applying a Filter 41
4.8.4 Customizing a Filter 42
4.8.5 Applying a Grouping 44
4.8.6 Searching for Records 45
4.8.7 Printing Grids 45
4.8.8 Exporting Data from Grids 46
4.8.9 The Grid Menu 47

5 Beyond the Basics 49

5.1 The Main Window 50
5.1.1 The File Menu 51
5.1.2 The Tools Menu 51

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Attendance Awards ... 52
Club Store ... 53
Gather E-mail Addresses and Textible Phone Numbers ... 54
Inventory Quick Reference ... 55
Data Import ... 56
SQL Workbench ... 58
New Year Setup ... 60
5.1.3 The Help Menu ... 64
5.1.4 The Toolbar ... 64
5.2 The Member Window ... 66
5.2.1 The Toolbar ... 67
5.2.2 Main ... 68
5.2.3 Misc ... 71
5.2.4 Roles ... 73
The Roles Dialog ... 74
5.2.5 Attendance ... 76
5.2.6 Handbooks ... 77
5.2.7 Awards ... 80
5.2.8 Events ... 81
5.2.9 Contacts ... 82
5.2.10 Fees ... 83
5.2.11 Leadership ... 84
5.3 Working with Inventory ... 85
5.3.1 Initial Inventory Setup ... 86
5.3.2 Inventory Tracking ... 86
5.3.3 Placing an Order ... 87
5.4 Working with the Ledger ... 89
5.5 Using the Windows App in Kiosk mode ... 90
6 The Log-in Dialog 94
7 The Home Page 96
7.1 Customizing the Attendance Chart ... 97
7.2 The Club Calendar ... 98
8 The Clubbers Module 100
9 The Leaders Module 104
9.1 The Service Dialog ... 109
9.2 The Training Dialog ... 110
10 The Households Module 112
11 The Check-in Module 115
11.1 The Toolbar ... 116
11.2 The Check-in Grid ... 119
11.3 The Sections Completed Grid ... 120

12 The Ledger Module 123

12.1 Fees ... 123

12.1.1 The Fee Dialog ... 125

12.2 Payments ... 126

12.3 The Household Ledger ... 127

13 The Awards Module 134

13.1 The Award Dialog ... 135

14 The Events Module 138

14.1 The Event Dialog ... 139

15 The Contacts Module 141

15.1 The Contact Dialog ... 142

16 The Reports Module 144

16.1 Achievement Report ... 146

16.2 Attendance and Dues Worksheet ... 148

16.3 Attendance Report ... 149

16.4 Award List ... 150

16.5 Birthday List ... 151

16.6 Check-in and Progress Report Worksheet ... 152

16.7 Clubber List - Contact Information ... 153

16.8 Completed Handbooks ... 154

16.9 Current Handbook Status ... 155

16.10 Household Account Statements ... 157

16.11 Household and Member ID List ... 158

16.12 Household List - Contact Information ... 159

16.13 Leader List - Contact Information ... 160

16.14 Leader Service History ... 161

16.15 Leader Training History ... 163

16.16 Mailing Labels ... 164

16.17 Medical List ... 165

16.18 Member List with Photos ... 166

16.19 Member Profile ... 167

16.20 Name Tags ... 168

16.21 Point List and Worksheet ... 169

16.22 Receipts Report ... 170

16.23 Registration Form ... 172

16.24 Visitor List ... 174

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17 The Inventory Module 178

17.1 Items 178

17.1.1 The Inventory Item Window 180

17.2 Orders 184

17.2.1 The Order Window 185

18 The Admin Module 190

18.1 General 190

18.2 Generic Lookups 192

18.3 Awards 193

18.4 Options 196

18.5 Curriculum 201

18.5.1 Generic Handbook Window 202

18.6 Users 206

18.7 Club Setup 208

19 Approved Workman Terminology 215

Index 216

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Chapter 1

1 Welcome to the Windows App

The Approved Workman Cloud Database is a recordkeeping system for Awana clubs. It helps Awana leaders be more accurate and time efficient so they can do what's really important – *minister to children*.

The cloud database can be accessed by the Web App (app.approvedworkman.com) or the Windows App (AWdbRemote.exe). All references in this User Guide apply to the Windows App.

This guide is designed as both a course in using the Windows App and as ongoing reference while working with the application. It assumes familiarity with how to run an Awana club and focuses on how to use the Windows App in your club.

Conventions used in this User Guide

Important warnings! Pay attention!!

Additional information for clarification.

Tips that might be helpful.

How to get started...

- Review the Getting Started and Learning the Basics sections for an introduction to the application.
- Visit the Approved Workman Forum for helpful information.

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Chapter 2

2 Getting Started

- Sign up for a Free Trial of the Approved Workman Cloud Database on our website.
- When the demo database is ready, you will receive an email with instructions. It will include a link to download the Windows App (AWdbRemote.exe). The Windows App may also be downloaded from our website at any time.
- Use the demo to learn the basics of using the database and explore features while using sample data. Since the demo database will be deleted, don't worry about accidentally altering or deleting records.

  Do not enter all of your club data into the demo database as it will be deleted and a new database created when you subscribe.

  The demo database may also be accessed using the Web App. Information on the Web Aapp can be found on our Web App support page.

- After becoming comfortable with the cloud database, purchase a subscription. A new database will be created for you to begin using with your club's data.

  If you are a current Approved Workman Legacy Database customer and would like to switch to the Cloud Database, your data can be migrated to the cloud.

2.1 Minimum System Requirements

To run the Windows App, system configurations should meet these requirements:

- Operating Systems: Microsoft Windows 10, 8, 7, Vista, or XP (Apple and Linux OS's are not supported)
- Minimum RAM: Windows XP requires 512 MB, but 1 GB is recommended. Windows 10, 8, 7 and Vista require 1 GB, but 2 GB or more is recommended
- Free Disk Space: 200 MB
- Display: A minimum screen resolution of 1024x600 is required, 1024x768 or higher is recommended
- Internet Connection: the Windows App connects to data in the cloud, so requires an internet connection.

2.2 Downloading the Windows App

To download the Windows App, use the link included in the setup email or download it from our website. The executable (AWdbRemote.exe) should be placed on your desktop to make updates easier.

Downloading the Windows App Executable (AWdbRemote.exe)

1. Open an Internet browser and go to our website.
2. At the top, click on "Cloud Database", then click the "Download Windows App" button. Instructions are given on the page.
3. Click "Download Now".

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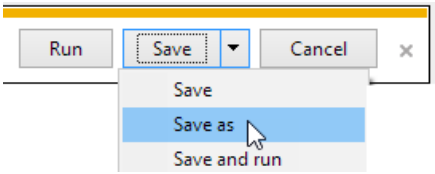
4. In the File Download dialog, click the dropdown and select **Save As**. Select the Desktop and click **Save**. The file download progress is displayed.



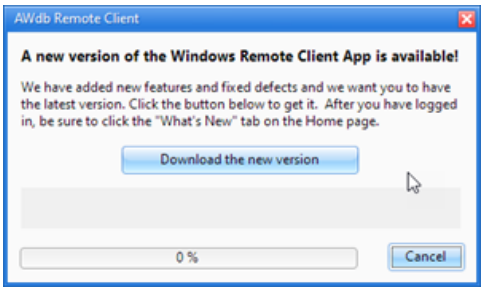
If no dialog appears asking where to save the download, it is probably saved automatically in the Downloads folder. Locate the Downloads folder and find AWdbRemote.exe. Use cut/paste to move the exe to your desktop.

5. The AWdbRemote icon will show on your desktop.

2.3 Updating the Windows App

The Windows App will periodically be updated to provide bug fixes and enhancements.

When a new version is available, a download button will be provided after you log in.



- Click **Download the new version**. A progress bar will show the new version is being downloaded. When it completes, the dialog will close and the new version will launch the log-in screen again.

The cancel button can be used; however, you can't skip the update when it is available. When logging in with a version that is less than the newest one, the download option will be presented.

When the file is replaced, you will notice that it isn't in the exact location on your Desktop that it was before, but it will still be there. Simply drag it back to your preferred location.

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2.4 Contacting Customer Support

Supporting You is Important to Us!

We are committed to providing great support to Approved Workman users! Although much time, effort, and care has gone into the development and testing of this application, we acknowledge that no software is ever totally bug free.

For problems not addressed in the included documentation, please contact Customer Support:

- E-mail: Support@LefflerSystems.com
- Phone: (see the Approved Workman website for our support number). Please limit calls to: Monday - Friday, 8:00 AM - 5:00 PM Central Time Zone. If evening or weekend support is required, please arrange an appointment by e-mail, or by calling during normal business hours first. Thank you.
- Remote Support: For some issues, a Customer Support representative might request a remote support session. This allows the support representative to share your computer screen to help resolve a problem.

The Approved Workman Forum provides helpful information and resources. It provides a way to get the latest news, submit reports of problems and enhancement requests, review Frequently Asked Questions, and watch training videos. It's also a great place to ask and answer questions and share ideas with other Approved Workman users. Refer to the "Info and Training - Cloud" and "Community Contributions - Cloud" boards.

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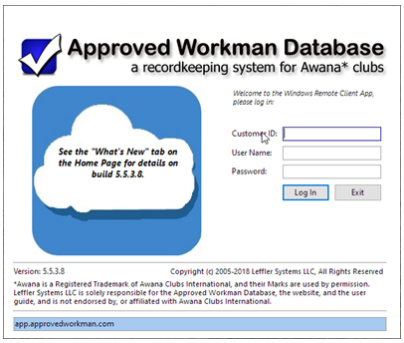
Chapter 3

3 Logging into the Windows App

Follow the steps below to log in to the Windows App:

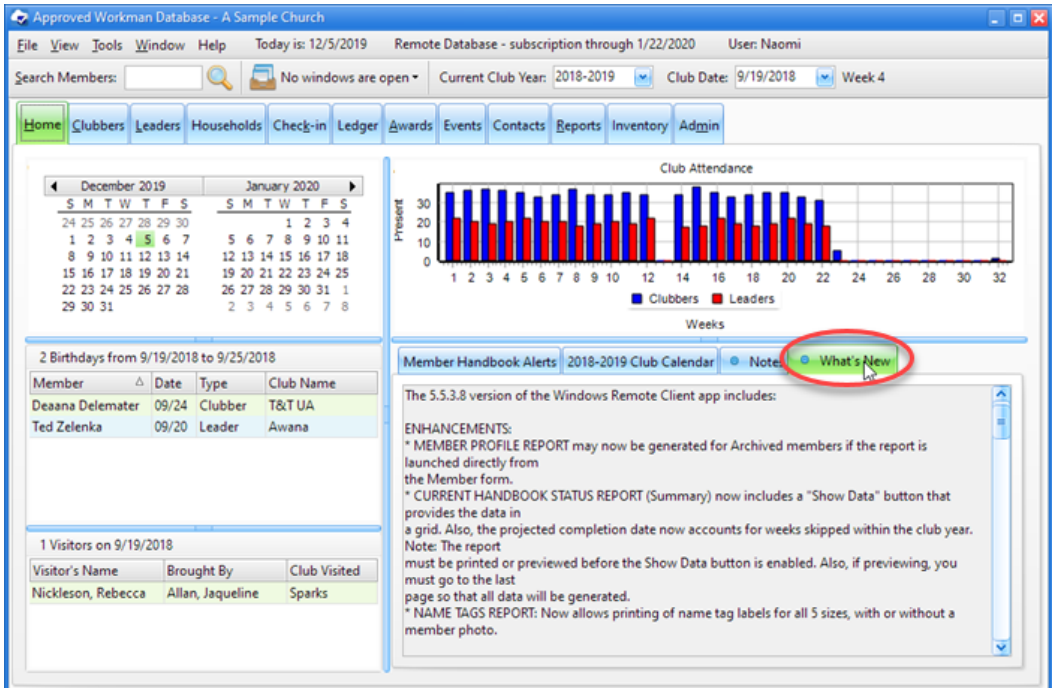
1. Double click the **AWdb Remote icon** on your desktop to open the Log-in dialog.

2. Type the **Customer ID, User Name** and **Password** for a user account.



Notifications will be given in the cloud area.

3. Click **Log In**. In a few seconds, the Main Window opens. The **What's New** tab on the Home page provides a list of enhancements and fixes in the new version.



Chapter 4

4 Learning the Basics

The Windows App consists of different modules that work together to maintain records for an Awana program. Each tab on the Main window represents a module. Each module has a chapter in the User Guide explaining its functionality. This chapter collects the basic information into one place to quickly learn about the Windows App. Use the navigation tools (forward and back links, topic links, and topic navigator) to keep coming back to this "Learning the Basics" page to continue with the next step.

Introductory Walk-through

1. Log in to the database.
2. Get familiar with the Main Window, including an overview of the different Modules.
3. Review the Club Setup to adjust point values and personalize items like Custom Field headings and Team Names.
4. Enter your church and club information so it prints on reports and can be used on order forms.
5. Review customizations under the Options tab.
6. For fun, personalize the database's look and feel.
7. Begin entering member records.
8. Assign members to teams, assign handbooks and uniforms.
9. Preview reports that might be useful getting started:
    - Registration Forms - for clubbers or leaders; blank or pre-filled
    - Name Tags - various sizes, with or without photos
    - Medical list - communicate medical conditions and allergy information with leaders
    - Worksheets - record attendance if no computer is available at check-in time
    - Detailed Handbook Status report or Check-in and Progress Report Worksheet - mark completed sections if no computer is available for the leaders during handbook time
    - Household and Member ID List - get a parent's initials when picking up a clubber
    - Birthday list and Award list - use during the closing ceremony
    - Clubber Contact Information - facilitate sending encouragement and birthday wishes
10. Use the Check-in Module to keep track of attendance, points, and dues
11. Mark handbook sections as completed and pull awards
12. Learn how to to work with the grids to generate ad-hoc reports

After learning the basics, continue to learn more!

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4.1 Customizing the Database

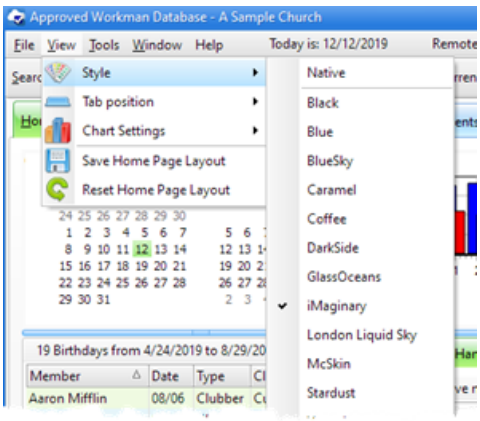
The look of the Windows App can be customized by changing the "skin" and the tab positions.

Choosing a Database Skin

A "skin" is a collection of style settings that affect the look and feel of the Windows App. Each skin has a different color scheme and might slightly alter the proportions of tabs, buttons, and text.

Most of the screen-captures in this manual use the "Imaginary" style.

To change the skin, select **View > Style** from the Main Window's menu bar. A submenu opens with a list of all the styles. Select a style. The look and feel of the Windows App will be immediately updated.

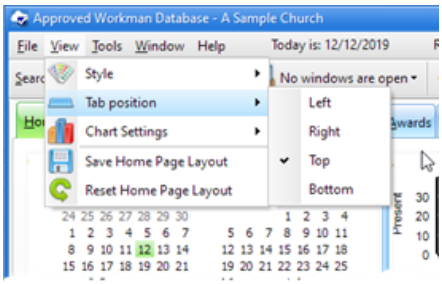


Choosing the Main Window's Tab Positions

The Main Window's tabs can be displayed along the top, bottom, left side, or right side.

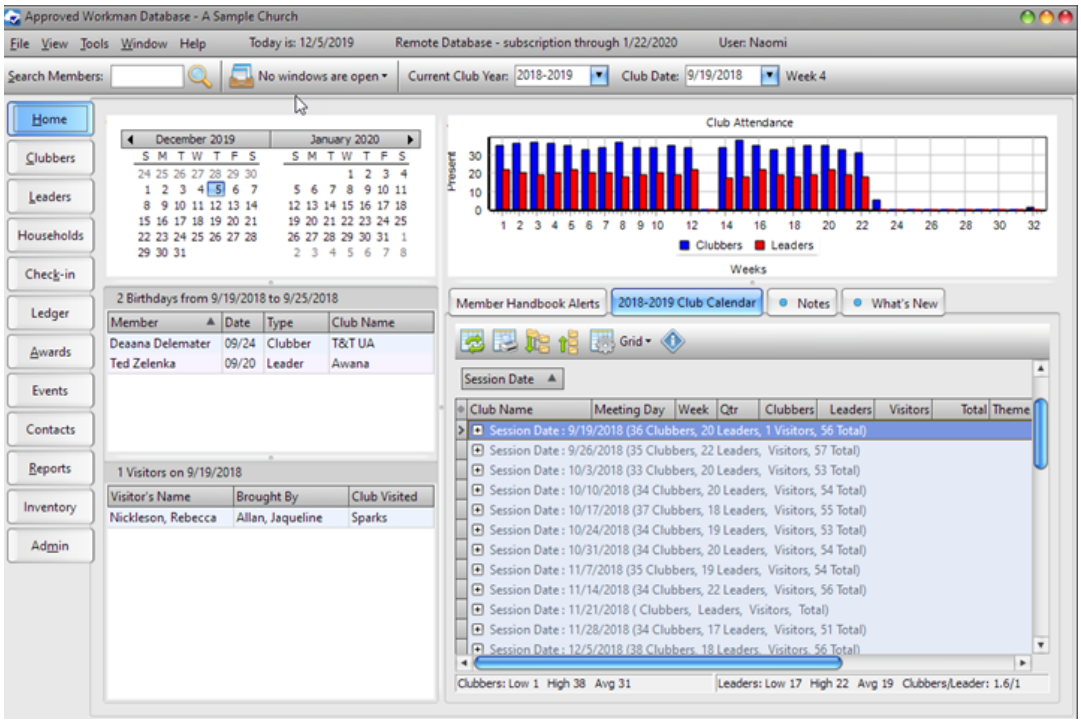
The default tab position is a horizontal row at the top of the Main Window. Most of the screen-captures in this manual show the tabs along top.

To change the tab position, select **View > Tab position** from the Main Window's menu bar. Select a tab position from the submenu. The Windows App will be immediately updated.

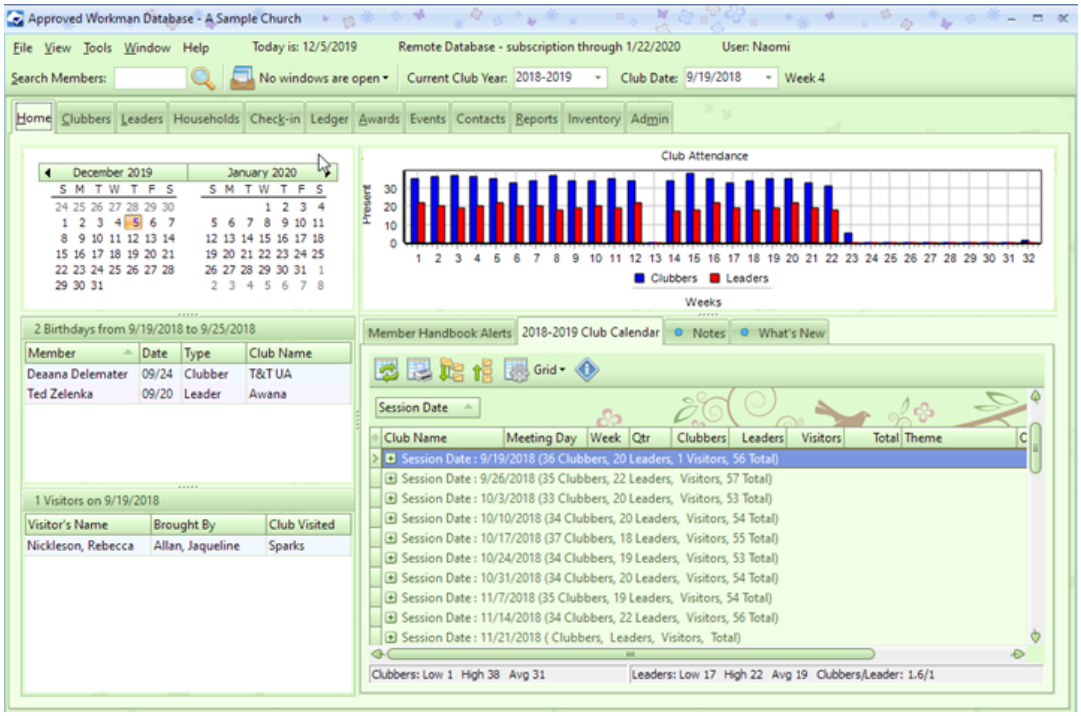


4.1.1 Screenshot Examples

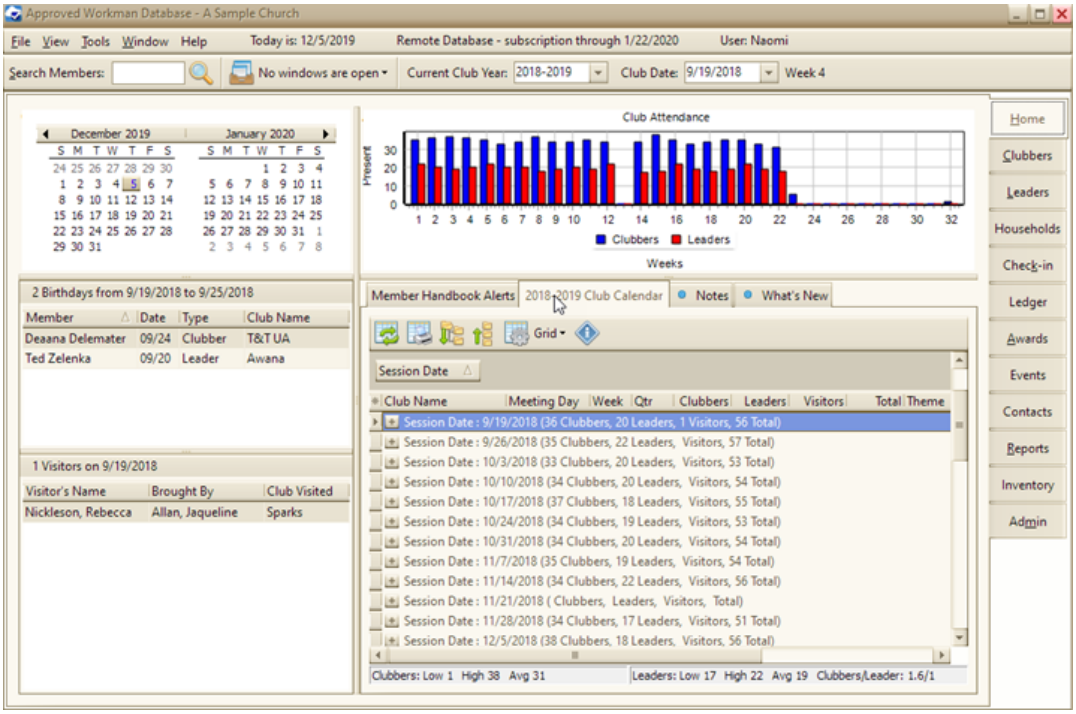
"McSkin" with Tabs on Left



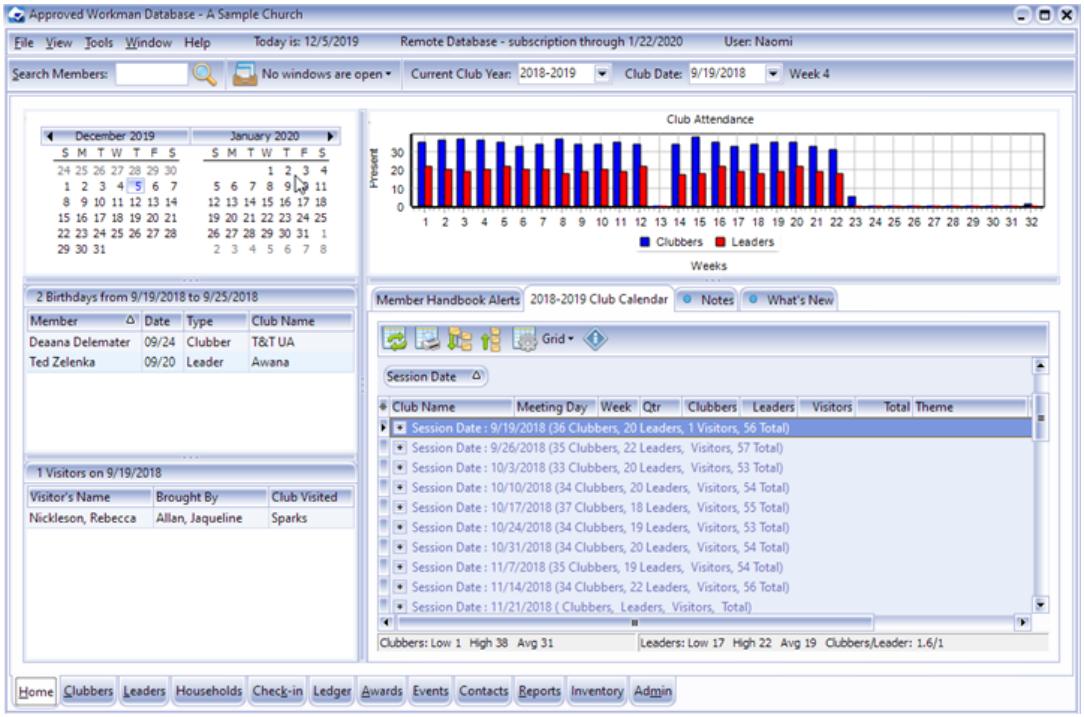
"Spring" with Tabs on Top



"Coffee" with Tabs on Right



"Stardust" with Tabs on Bottom



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4.2 Entering Clubbers and Leaders

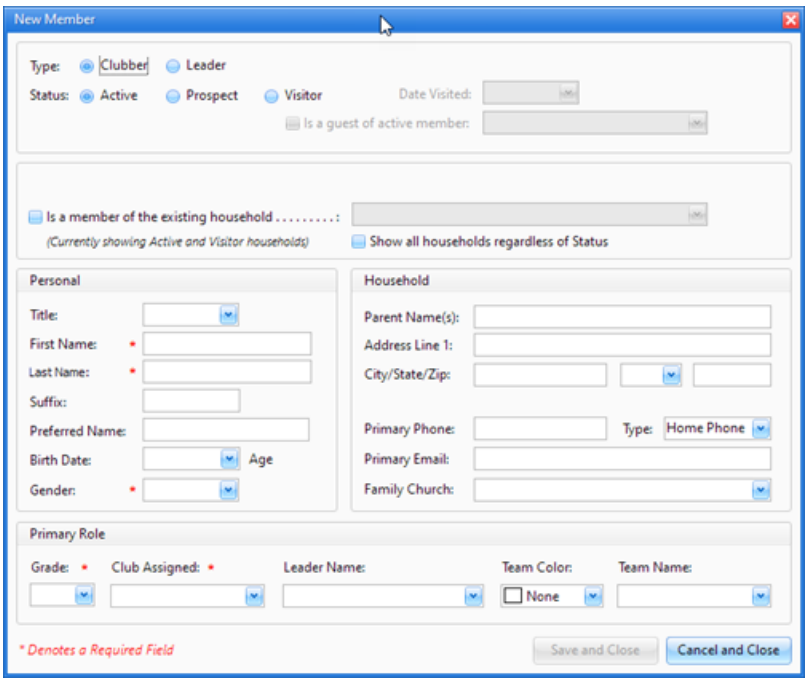
Be sure you are using a Live database before entering member data!!

Demo databases will be deleted and a new database created when you subscribe, so any members entered in the demo database will be lost.

To create a new member, use one of the following to open the **New Member dialog**:

- Clubbers Module, Leaders Module, or Check-in Module toolbar: **New Clubber/Leader/Member** button
- Member Window toolbar: **New in Household** button
- Registration Window, Step 1 grid toolbar: **New Clubber (in this Household)** button

Some of the above modules also have a right click pop-up menu option to add a member.



Enter the following information:

- **Type -** Clubber or Leader
- **Status** - defaults to Active, but Prospect or Visitor can be selected. For status of Visitor, additional options are enabled to indicate the **Date Visited** and if the person **Is a guest of an active member**. The member who brought the guest can be selected from the drop-down list.
- **Is a member of an existing household** - check the box and select the household from the drop-down list. This will populate the Household information in a read-only format.

The list of households defaults to Active and Visitor households. If the household is not in the list, check the box to **Show all households regardless of Status**.

- **Personal** - **Title, First Name, Last Name, Suffix, Preferred Name, Birth Date** and **Gender**

  Some fields are filled automatically as data is entered (i.e. selecting a **Title** fills in **Gender**; entering a **Birth Date** calculates **Age** and **Grade**. With gender and grade, a **Club Name** is assigned.)

- **Household** - **Parent Name(s), Address, Primary Phone** (and **Type**), **Primary Email address** and **Family Church**
- **Primary Role** - **Grade, Club Assigned, Leader Name, Team Color** and **Team Name**

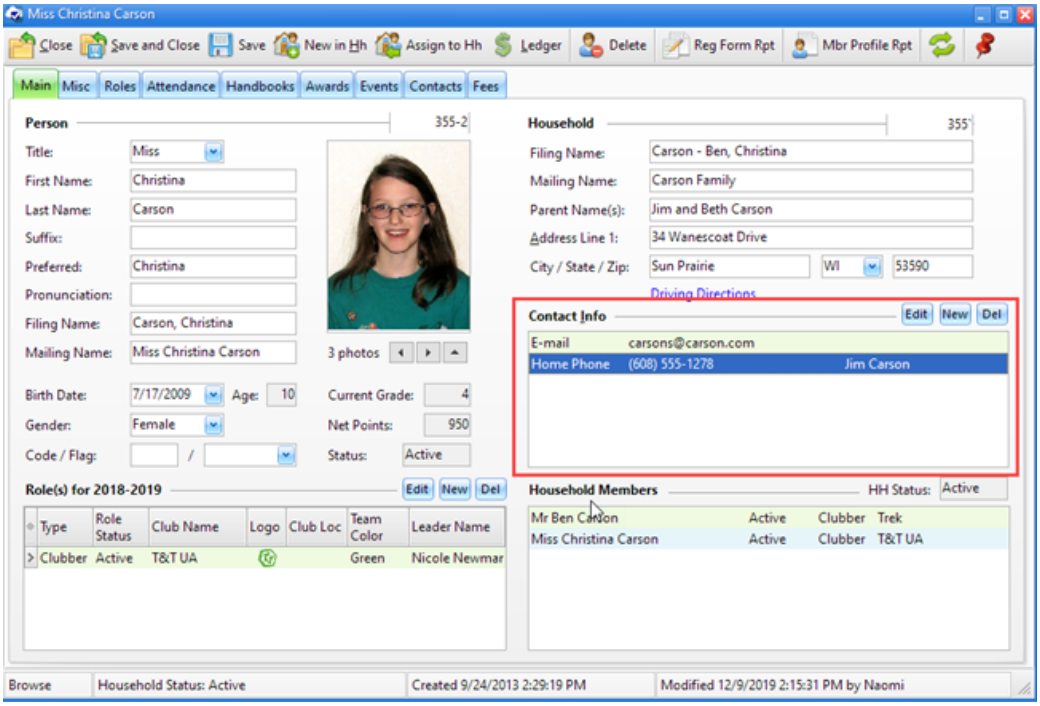
  It is generally easier to Assign a team from the main Clubbers list for multiple members at once.

- **Save and Close** - saves the record, closes the dialog and opens the Member record.
- **Cancel and Close** - closes the dialog without saving.

4.2.1 Entering Contact Info

Capturing contact information, such as phone numbers and e-mail addresses, facilitates communication. This information is entered for the entire household.

The **Contact Info** grid shows the household contact information on the Main page of any household member's record.



- To remove a contact record: select a row in the grid, then click **Del** above the grid or right click and choose **Del Phone/E-mail**
- To change a contact record: double-click on the selected row, or select a row in the grid then click **Edit** above the grid or right click and choose **Open Phone/E-mail**
- To add a new contact record: click **New** above the grid

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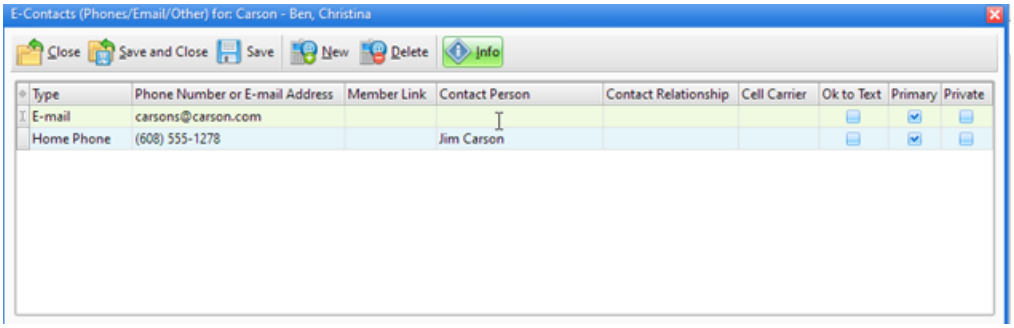
Adding or editing a contact record opens the E-Contacts dialog.



Phone numbers and e-mail addresses are shared by all members of the household so only need to be entered once. [The exception to this is if the Member Link is used, see below.]

- To add a contact, click **New**. A blank, editable row is added to the grid. Enter the following:
  - **Type** - selection options are determined by **Admin > Generic Lookups** > **Comm Types.**
  - **Phone number or E-mail address** - phone numbers are automatically formatted. Simply type the numbers without dashes or parentheses.

    There is an option to automatically add a default area code under **Admin> Options** > **Members**.

  - **Member Link** - links a phone or e-mail to a specific person. The link is used by the Gather E-mail Addresses and Textible Phone Numbers tool to identify only phone numbers or addresses associated to specific **Member Types** or **Club Names**.
  - **Contact Person** - person associated to the contact record.
  - **Contact Relationship** - indicates the relationship of the contact person to the member/s; selection options are determined by **Admin > Generic Lookups** > **Contact Relationships**.
  - **Cell Carrier** - domain to append when sending SMS text messages from an e-mail client to a cell phone. Selection options are determined by **Admin > Generic Lookups** > **Cell Phone Carriers**.
  - **OK to Text** - indicates a cell phone IS textible AND permission has been given to text.

    To send text messages to a cell phone through e-mail, the carrier must be known. When requesting permission to send messages, also ask for the carrier.

  - **Primary** - one phone number and one e-mail address for the household to use in the **Clubber**, **Leader**, and **Household** Lists.
  - **Private** - indicates the record will not be printed on any formal report.
- To remove a contact from the list, select a row in the grid, then click the **Delete** button.
- To show/hide information about the dialog, click the **Info** button.
- When information is edited, the **Save** and **Save and Close** buttons will become enabled.
- Use **Close** to exit the dialog without saving changes.

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4.2.2 Setting Registration to Current

The **Registration is current** check box on the Member's Role record tracks which members have turned in the registration forms. This field can be shown in the main Clubber list or Leader list under the Registration header band as well as on the Member Form's Roles tab. It can be selected directly on the role dialog. Using Register and Post a Payment or the Registration Window will mark it automatically.

Register and Post a Payment allows a date selection and posting of an unapplied payment. It sets the member's **status** to "Active" and creates a fee record for annual dues (if applicable). Access it from:

- Clubbers Module , Leaders Module or Check-in Module toolbar: **Action > Register and Post Payment** menu item

Each module also has a right click pop-up menu with this option.

The Registration Window provides a way to review member information, select members to register, assign books and uniforms, review fees, post payments and print registration reports. Access it from:

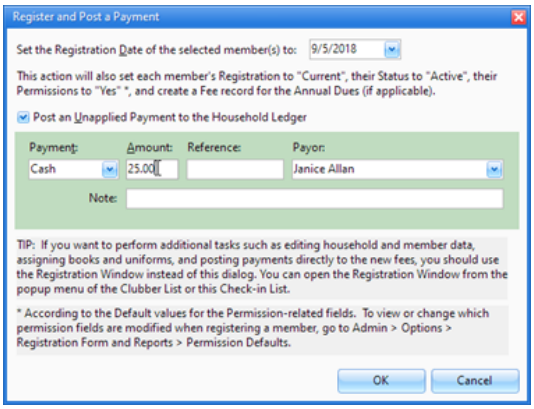
- Clubbers Module , Leaders Module or Check-in Module toolbar: **Begin the Registration Process** button
- Households Module toolbar: **Open Registration Window** button

Each module also has a right click pop-up menu with this option.

4.2.2.1 The Register and Post a Payment Dialog

The Register and Post a Payment dialog provides a convenient way to quickly mark one or more members as registered and enter a payment that was made during registration.

The payment portion is disabled when invoked for more members from more than one household.



- **Set the Registration Date** - defaults to the Current Club Date, but can be changed.
- **Post an Unapplied Payment to the Household Ledger** (optional) - checking the box enables the payment options. The payment can be applied to specific fees later using the Household Ledger.

The payors in each household are remembered and displayed in the drop-down for future use.

- **OK** - sets **Registration Current** and **registered** date in the Member's Role record. It also sets the **Permissions**-related fields (based on Admin > Options > Registration Form and Reports > Permission Defaults), the member's **Status** to "Active" and creates a fee record for the Annual Dues (if applicable).
- **Cancel -** exits the registration process without saving it.

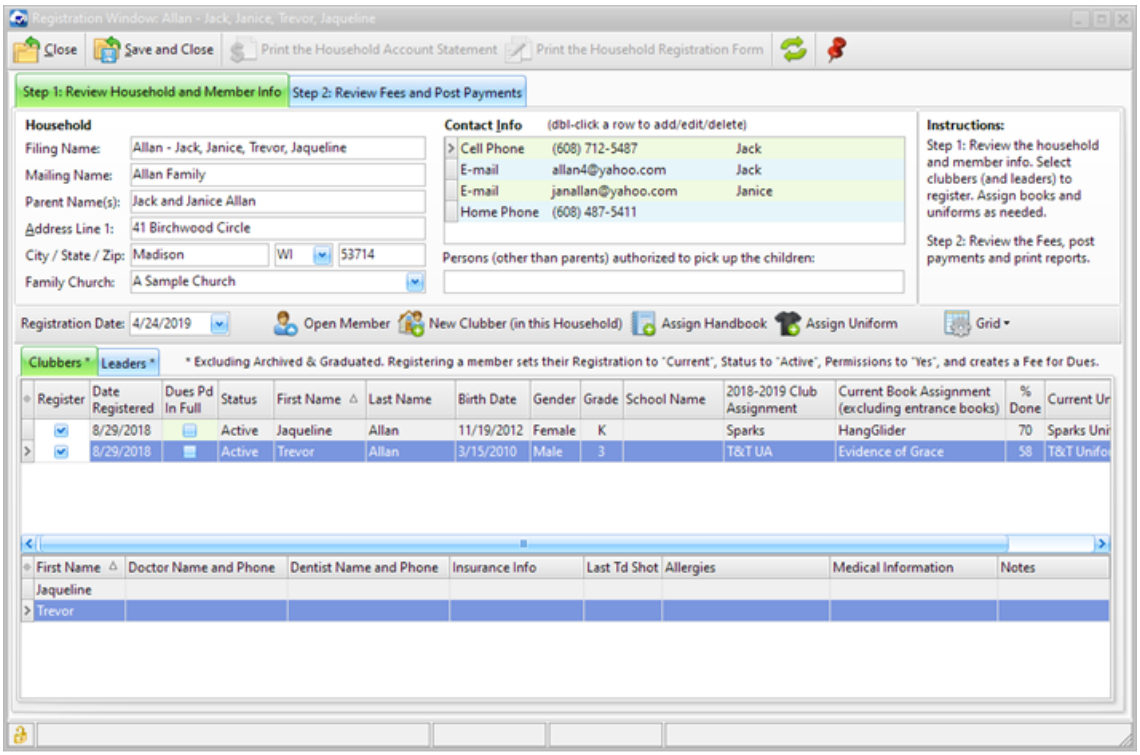
Use the Registration Window dialog to perform additional tasks such as editing member data, assigning books and uniforms, or posting payments directly to fees.

4.2.2.2 The Registration Window Dialog

The Registration Window provides a single point of access for the multiple tasks related to registration. Review and edit household and individual member information, select members to register, assign books and uniforms, review fees, post payments, and print registration related reports.

Step 1: Review Household and Member Info

Step 1 is divided into three sections: Household, Contact Info, and the Individual Member section.



- **Household** - current household information is shown and can be edited directly.
- **Contact Info** - current contact information is shown. To add/edit/delete contacts, double click a row to open the E-Contacts dialog.
- **Individual Members** - separate tabs for Clubbers and Leaders. Each tab has two read-only grids that provide information useful when registering members. To make changes, open the Member Window by double clicking on a row or using the **Open Member** button on the toolbar. Update information, then **Save and Close** the member record to return to the Registration Window.

Icon	Action	Description
	Reg. Date	The date defaults to the current club date but can be changed.
	Open Member	Opens the selected member in the Member Window. (Pressing the **Enter** key with a row selected or double clicking the row also opens the member record.)
	New Clubber (in this Household)	Opens a new member form pre-filled with the selected household's information.
	Assign Handbook	Opens the Assign Handbook dialog to assign a new handbook to the selected member.
	Assign Uniform	Opens the Assign Uniform dialog to assign a new uniform to the selected member.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

- **Register** - checking the box sets **Registration is Current** and **registered** date in the Members Role record when the record is saved. It also sets the **Permissions**-related fields, the member's **Status** to "Active" and creates a fee for the Annual Dues (if applicable).

Review **Club Assignment**, **Current Book Assignment** and **Current Uniform**. If new items are needed, use the buttons above the grid to open the appropriate assignment dialog.

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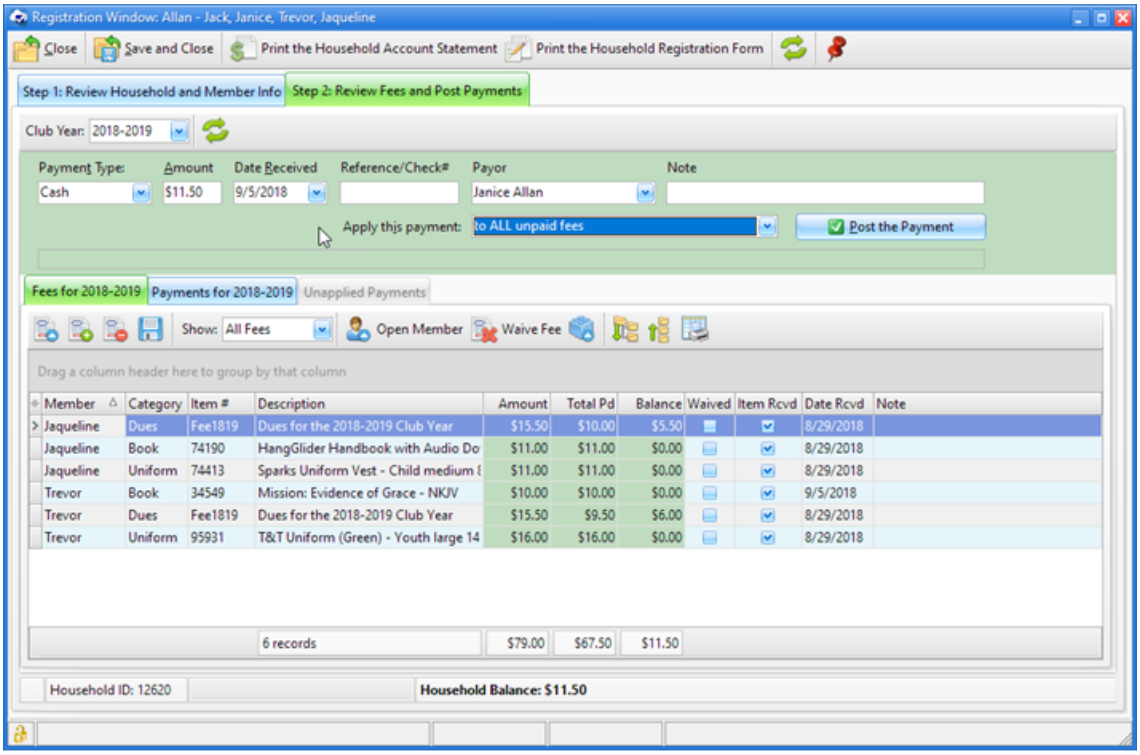
Step 2: Review Fees and Post Payments

Step 2 shows the Household Ledger. See the Household Ledger section for additional information.



Review fees that were created automatically. Use the **New Fee** button to add additional items. Post payments, then print a Household Account Statement or a Household Registration Form. The registration form includes an option to "**Display a summary of Fees and Payments in the Office Use area**" to use it as a receipt of payment or a bill for an unpaid amount.

Icon	Action	Description
	Save and Close	Saves the changes and then closes the Registration window.
	Print the Household Account Statement	Opens the Household Account Statement report dialog for the selected household.
	Print the Household Registration Form	Opens the Registration Form report dialog for the selected household.
	Refresh	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	Stay on Top	Toggles whether or not the window stays on top of the main window.

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4.2.3 Assigning Handbooks

Each active and visiting clubber should have at least one handbook assigned. (Visitors should be assigned an entrance booklet based on grade.) When initially adding clubbers to the database, assign completed handbooks for historical purposes and then mark each as **Done**. See the Member Window's Handbooks page for more details on managing handbooks.

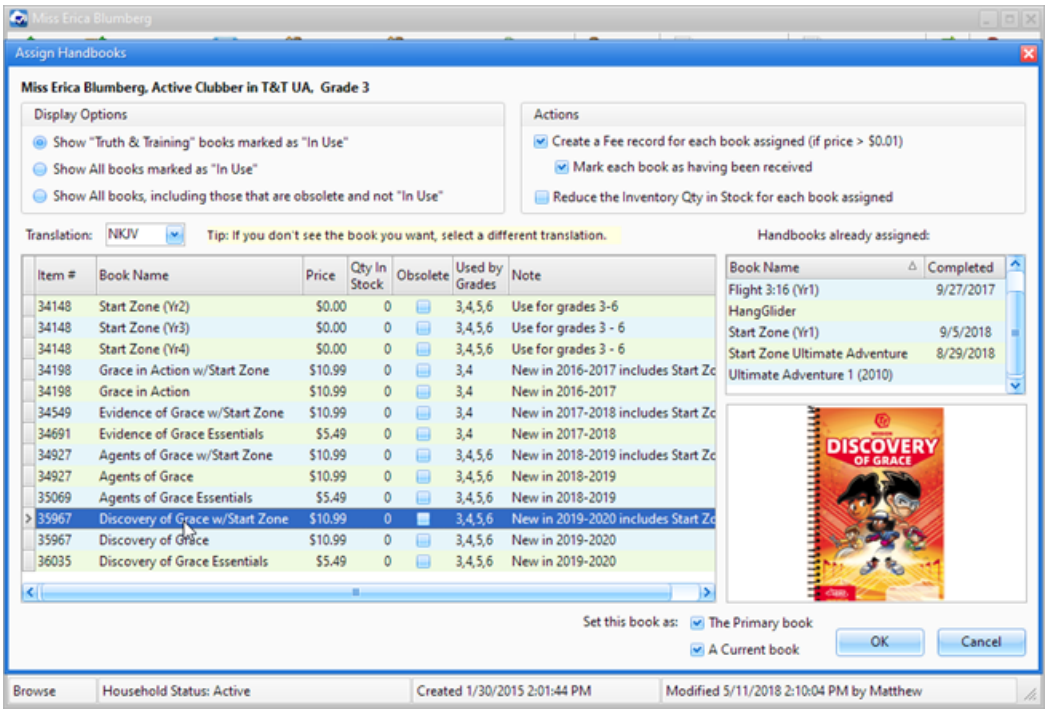
The Assign Handbooks dialog can be invoked as follows:

- Member Window > Handbooks tab toolbar: **Assign Handbook** button
- Clubbers Module toolbar: **Action > Assign Handbook** menu item

  Handbooks can be assigned using the multi-select ability for up to 20 members on the clubber or check-in grid.

- Check-in Module toolbar: **Assign Handbook** button or **Action > Assign Handbook** menu item
- Registration Window, Step 1 grid toolbar: **Assign Handbook** button
- Choosing **Yes** when prompted to assign the next handbook after a clubber completes a book.

  Each module also has a right click pop-up menu option to Assign Handbook.



- **Display Options** - filter selections for the list shown in the grid. By default, only books used by the current club and marked as In Use in the Inventory Item Window are displayed.
- **Translation** - further filters the list of handbooks in the grid based on the translation. This defaults to the individual's **Preferred Translation**.

Set the default translation under **Admin > Options > Misc**. This default translation is used when a new member is created. The individual's **Preferred Translation** can be changed on the Misc tab of the Member Window. The individual preference is what is used on the Assign Handbooks dialog.

While most handbooks are available in all of the translations, there are some exceptions. If the book isn't initially displayed, try selecting the **(All)** option.

- **Actions** - determine additional steps taken when assigning this handbook.
  - **Create a Fee record for each book assigned**
  - **Mark each book as having been received** (if a fee is created)
  - **Reduce the Inventory Qty in Stock for each book assigned** (do NOT check when entering historical data)

  Change the default settings for the actions under **Admin > Options > Misc**.

- **Handbooks already assigned** - for reference only; the list of handbooks to select for assignment will not include books already assigned.
- **Set this book as: The Primary book** or **A Current book** - choose the status of the book.

  Primary - the main book a clubber is working in. This will be shown in the Clubbers or Check-in grids. Some reports may only include the primary book.

  Current - any book a clubber is working in. All current books will be displayed in the handbooks section. Most reports can be run for all current books.

  This can be helpful at the beginning of the year when assigning both an entrance book and a main handbook. The entrance book can be set as the Primary and the main handbook set as a current book. Once the entrance book is completed, the main handbook can become the primary book.

- **OK** - adds the book to the member's Handbook list and completes any selected actions.
- **Cancel** - exits the handbook assignment dialog without saving.

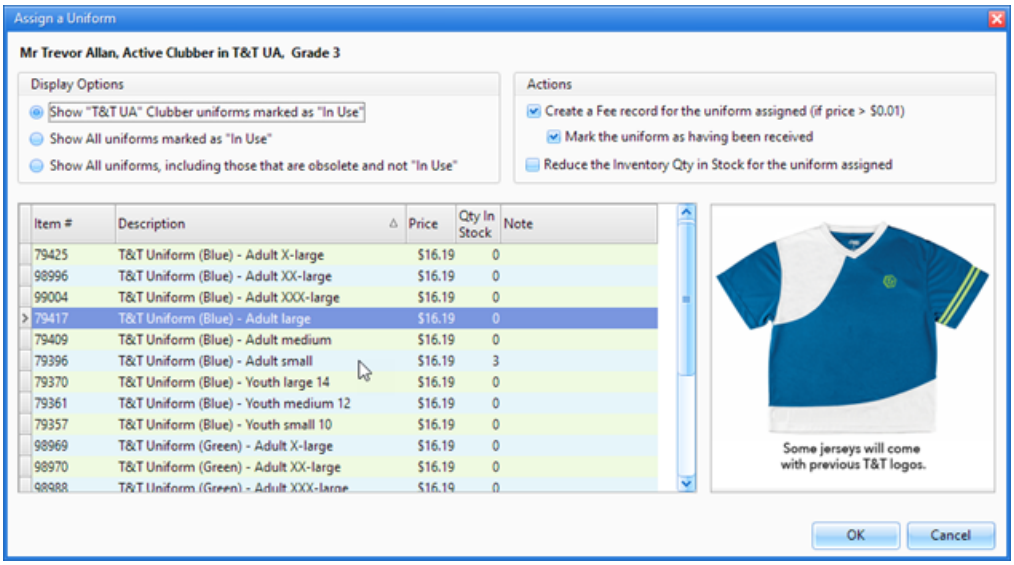
4.2.4 Assigning Uniforms

When a clubber completes an entrance booklet, a "reminder award" is triggered indicating the clubber is eligible for a handbook and a uniform (if applicable).

The Assign Uniform dialog can be invoked in the following ways:

- Clubbers Module toolbar: **Action > Assign Uniform** menu item
- Check-in Module toolbar: **Assign Uniform** button or **Action > Assign Uniform** menu item
- Registration Window, Step 1 grid toolbar: **Assign Uniform** button
- Roles dialog: **Assign Uniform** button (under **Registration Info** section)
- Choosing **Yes** when prompted to assign a uniform after a clubber completes an entrance book.

  Each module also has a right click pop-up menu option to Assign Uniform.



- **Display Options** - filter selections for the list shown in the grid. By default, only uniforms used by the current club and marked as In Use in the Inventory Item Window are displayed. With the first option, the list is further filtered based on the associated role type (leader or clubber).
- **Actions -** determine additional steps taken when assigning this uniform.
  - **Create a Fee record for each uniform assigned**
  - **Mark each uniform as having been received** (if a fee is created)
  - **Reduce the Inventory Qty in Stock for each uniform assigned** - (do NOT use for historical data)

  Change the default settings for the actions under **Admin > Options > Misc.**

- **OK** - checks the **Has Uniform** box on the Member's Role record and fills in the description.
- **Cancel -** exits the uniform assignment dialog without saving.

4.2.5 Assigning to a Team

All clubs organize clubbers by assigning them to a specific Club Name. To group clubbers into smaller subgroups, assign a Team Color and/or a Team Name.

- **Color -** includes the common Awana team colors: Red, Yellow, Green and Blue. The following additional colors are also included: Purple, Silver, Aqua, Orange, Pink, Gold, Gray and Brown
- **Name -** unique team names can be used in addition to the club name and team color. Enter team names under **Admin > Club Setup > Team Names.** After creating team names, members can be assigned to a team.

  Historical team names can't be deleted. To remove a team name from the current drop-down selections, uncheck the 'in use' box.

Team Color and/or Team Name can be assigned in the following way:

- Clubbers Module or Check-in Module toolbar: **Action > Set Team Name** menu item
- Leaders Module toolbar: **Action > Set Team Color** or **Set Team Name** menu item
- Member's Role record: **Team Name** or **Team Color** field

Each module also has a right click pop-up menu option to Set Team Color or Set Team Name.

If the team colors are changed each week, there are also options to **Clear all Team Colors for this week** and **Reset all Team Colors for this week** from the toolbar's **Action** drop-down menu (or the grid's right click pop-up menu).

Changing the Team Color or the Team Name changes the value on the member's Role record and also updates the Attendance (session) record for the Current Club Date and all future dates. Past dates are not changed to maintain historical accuracy.

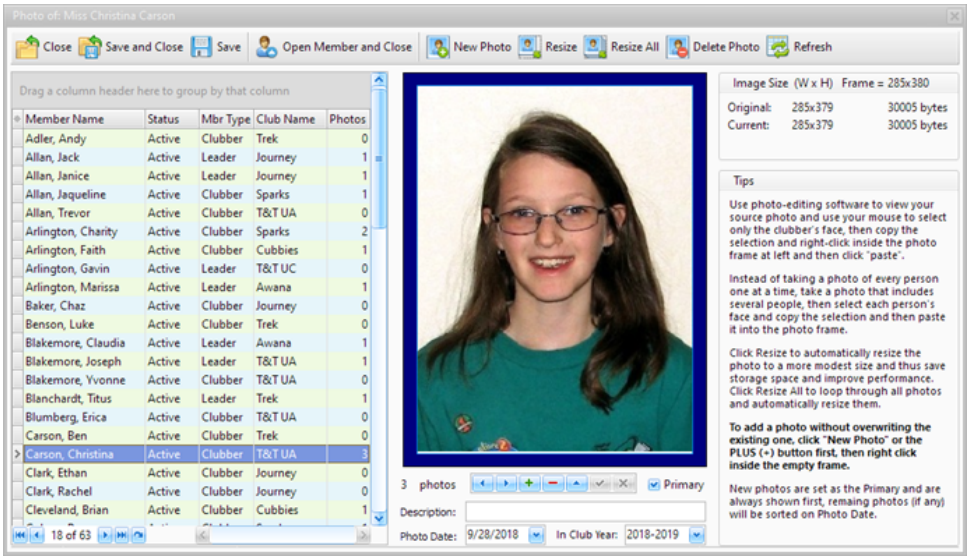
The quickest way to set the Team Color and/or Team Name for multiple clubbers/leaders is by using the Clubbers , Leaders or Check-in Module. Work with the grid to show members in a way that allows easy selection of multiple rows, then select **Set Team Color** or **Set Team Name** from the toolbar's **Action** drop-down menu (or the right click pop-up menu in the grid). This will update the color or name for all selected members.

4.2.6 Managing Member Photos

Member photos are especially helpful in large clubs where it might be hard to remember names. There are several reports that can use the photos, plus photos are displayed whenever the Member Window is opened. The Photo Manager provides an easy way to review and load photos for any member in the database. It can be invoked from the:

- Main Window Tools menu: **Tools > Manage Photos** menu item
- Member Window: Double click on the photo
- Clubbers Module or Leaders Module toolbar: **View/Edit the Photo(s)** button

Each module also has a right click pop-up menu that includes **View/Edit the Photo(s)**.



- Select a member's name in the grid on the left. If a Photo exists it is displayed in the frame.

  Manipulate this grid as explained in Working with Grids.

- Multiple photos can be saved for each member. Normally there would be one for each year, but there is nothing to prevent more. Select the photo to display in the Member Window by marking it as **Primary**. If there are multiple photos for a member, click the left and right arrows beneath the photo to see all of the photos, sorted by the photo's date.
- To add a new photo: click **Plus (+)** beneath the photo. This puts an empty placeholder in the photo frame, then use one of the following:
  - Right click on the empty frame and select **Load...** from the pop-up menu. Locate and select the photo file for the selected clubber, then click **Open**. This works well if you have photos of each clubber (such as "head shots") in external files.
  - if you have a photo of a group of clubbers, open it in photo editing software. Select and **copy** the clubber's face, then right click and select **Paste** from the pop-up menu.

Icon	Action	Description
	Close	Closes the Photo Manager without saving current changes.
	Save and Close	Saves the changes and then closes the Photo Manager.
	Save	Saves the changes and leaves the Photo Manager open.
	Open Member and Close	Opens the Member Window for the selected member and closes the Photo Manager.
	New Photo	Adds a new photo to the selected member. [Functions the same as the **Plus (+)** button beneath the photo.]
	Resize	Resizes the member's photo if it is larger than the frame. This saves storage space and improves performance.
	Resize All	Resizes all of the photos as needed.
	Delete Photo	Removes the current photo. [Functions the same as the **Minus (-)** button beneath the photo.]
	Refresh Grid	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.

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4.3 Basic Check-In

The Check-in Module includes the functionality most used during club time. It is the data entry screen for all of the attendance, dues, and handbook information. It calculates points and triggers awards. This section provides basic information about checking in clubbers and leaders. For more details, see The Check-in Module.

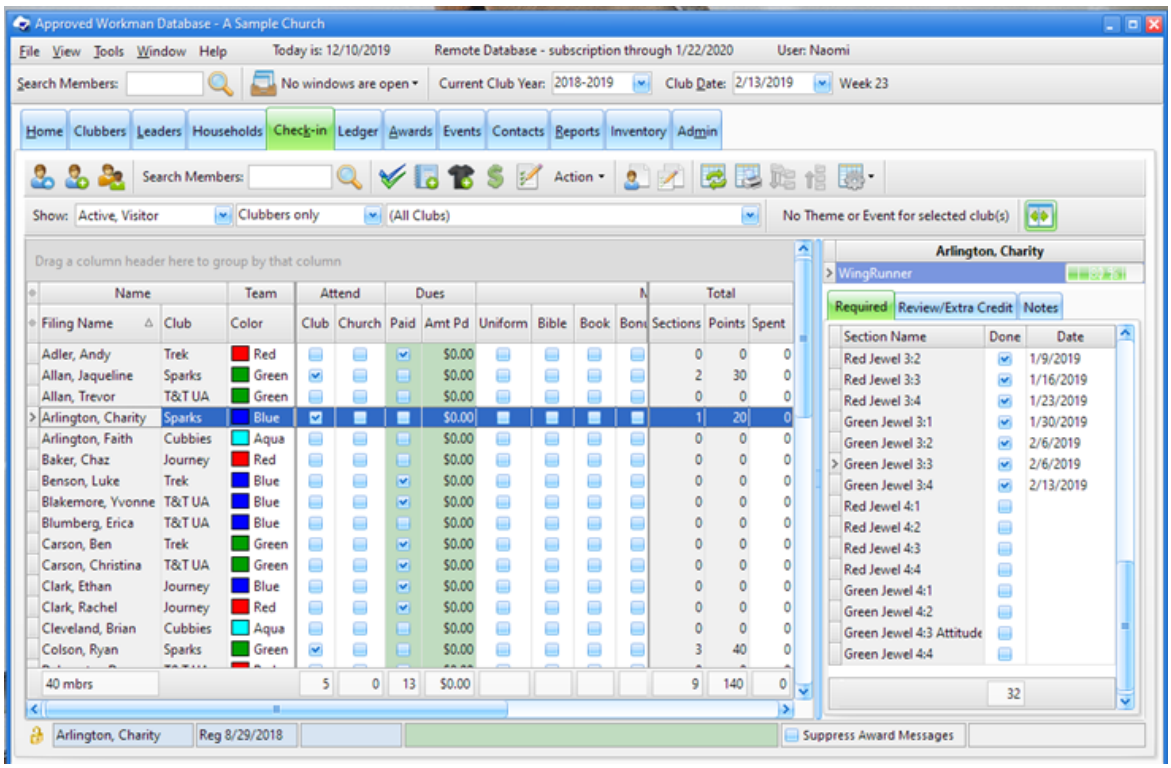
To begin, make sure the **Club Date** is set correctly on the Main Window, then:

1. Click the **Check-in** tab to display the large grid of leaders and/or clubbers.
2. Click on a member's row. Mark the check boxes for the various items related to Attendance, Dues, Offering, Miscellaneous, and Visitors.

As check boxes are marked, the **Points** column shows the automatically calculated total points earned.

For quicker data entry, select multiple members and use the Action drop-down or right click pop-up menu option of **Set Attendance > Present/Not Present** to mark (or clear) attendance for a group. Filtering, sorting and/or grouping the records first will help with selections.

Use the **Speed Check** (the double checkmark icon on the toolbar) option to mark additional items when the attendance box is marked. Set preferences under **Admin > Options > Check-In**.



- **Attend** - indicate Club and Church (Sunday School) attendance as well as Excuse Club and Church attendance.

- **Dues** - indicate dues were **Paid.** When the box is checked, the **Amt Pd** value is populated with the default weekly dues amount. If an amount is paid that is different from the normal weekly dues amount, type over the value in the **Amt Pd** field to indicate the actual amount received.

  Only money paid for DUES should be entered in the **Dues Amt Pd** field. These amounts are automatically entered as a cash payment for the DUES FEE on the Household Ledger. To enter a payment for anything other than Dues, open the Household Ledger to record the payment.

- **Offering** - **Amount** of money given that is not for dues or other fees. Money collected for offerings is credited to the Offering Fund designated for the selected week and club. These designations are set under **Admin > Club Setup > Club Calendars**. There can be different Offering Funds for each club and the fund can be changed from week to week.

- **Miscellaneous** - indicate if a member wore a uniform, brought a Bible or handbook, or earned the bonus (such as participating in a theme night).

  Two additional check boxes can be customized under **Admin** > **Club Setup** > **Custom Fields**.

  Visitors - the **# of visitors** is calculated based on visitors added for the selected member using the **Add a Visitor** button in the toolbar above the grid.

- **Points** - enter amount earned from **Game** time or for any **Other** reason. Use a positive or negative number to add or subtract points (for example, rewarding positive behavior or disciplining inappropriate behavior, respectively).

- **Req and Extra Sections** - read-only showing the number of sections completed on the current club date

- **Total** - summary of **Sections, Points,** and points **Spent.** There is also a **Note** field that can be used for additional information, for example, to track details related to awarding 'Other' points.

- **Handbook Sections grid** - the right side of the Check-in screen shows the details of the clubber's current handbook(s) to track completed sections. When the **Done** box is checked the **Date** of completion defaults to the Current Club Date, but can be changed if needed. Awards earned by completing the section(s) are triggered automatically and a message is displayed.

  For quicker data entry for clubs that all work on the same section, like Cubbies or T&T, select multiple members that all completed the same section and then mark the section completed. All of the selected members' handbooks will be updated.

- **Status bar** - located below the grid, it provides information for the selected member including the **registration date**. There is also a check box to "**Suppress Award Messages**".

  For more information about suppression of award messages, see the section on creating and assigning Awards.

4.4 Adding a Visitor

Visitors can be added to the database by clicking the **Add a Visitor** button on the Check-in Module toolbar or by selecting a Status of Visitor on the New Member dialog.

To give a clubber credit for bringing a guest (visitor) a second time, the **Add a Visitor** button must be used. Since the visitor is already in the database, the New Member dialog can't be used.

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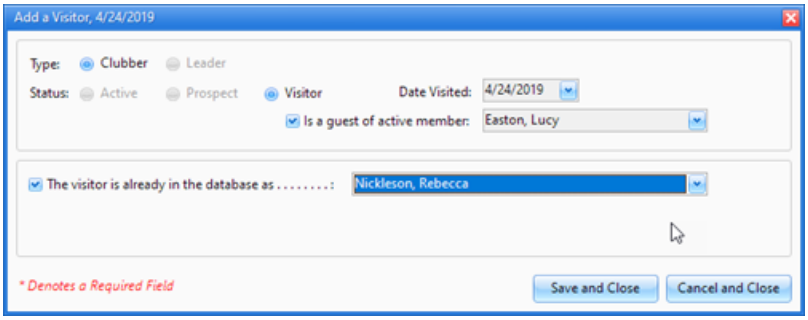
Using the **Add a Visitor** button opens the Add a Visitor dialog:



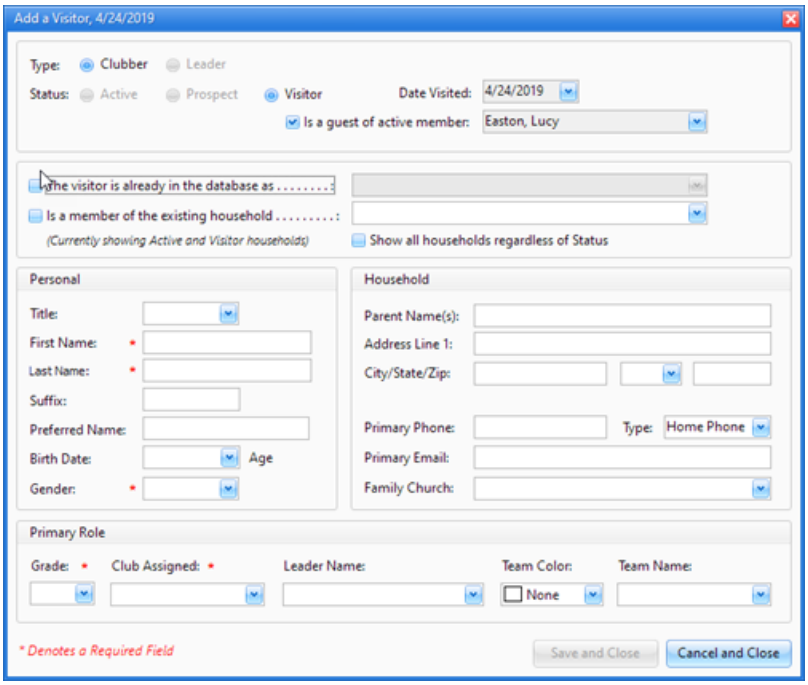
The first section is read-only with the following items set: **Type** - Clubber; **Status** - Visitor; **Date Visited** - the Current Club Date; **Is a guest of active member** - checked and the member selected when the dialog was invoked is listed.

To add a visitor that was not brought by a current member, use the **New Member** button and select a **Status** of 'Visitor'.

The second section may be edited as follows:

The visitor is already in the database as... - defaults to checked.

- If this is true, select the clubber's name in the dropdown list. **Save and Close** the dialog.
- If the visitor is not already in the database, uncheck the box. The dialog expands to show the fields from the New Member dialog. Complete the fields the same as when entering a new member.



4.5 Working with Dues

Details and settings for working with dues are found throughout the Windows App. This section provides an overview of how to set dues amounts, mark dues as paid, and record payments for annual dues fees.

Assigning Dues Amounts

Although perhaps not common, it is possible for each club to charge different amounts for dues. For example, Nursery might have zero dues, Cubbies $16/year, and Sparks and T&T $32/year. Also, clubbers might pay dues once for the entire year or pay a little each week. The Windows App can accommodate a variety of ways to handle dues.

To assign the amount of money each clubber should pay for dues:

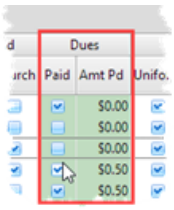
1. On the Main Window, click **Admin > Club Setup** > **Club Names, Logos, Dues and Points**. In the grid, there are two rows which deal with dues assignments for each club.

2. Enter the **Weekly Dues Amount** and the **Annual Dues Amount** for each club.
   - The weekly dues amount is used when the **Dues Pd** check box is marked on the Check-in grid.
   - The annual dues amount determines the amount of the dues fee created when a clubber is registered (or a weekly dues payment is made).

   Try to use values that make mathematical sense. For example, if weekly dues are $1.00 and there are 32 weeks, then the annual dues should be $32.00.

Marking the Weekly Dues as Paid

The easiest way to mark weekly dues as paid is to use the Check-in Module as follows:



1. Make sure the Current Club Date is set correctly.
2. Check the **Paid** box. A CASH payment is created for the clubber in the Household Ledger.
3. The **Amt Pd** defaults to the amount set for weekly dues under **Admin > Club Setup** > **Club Names, Logos, Dues and Points** but can be changed by typing over the amount.

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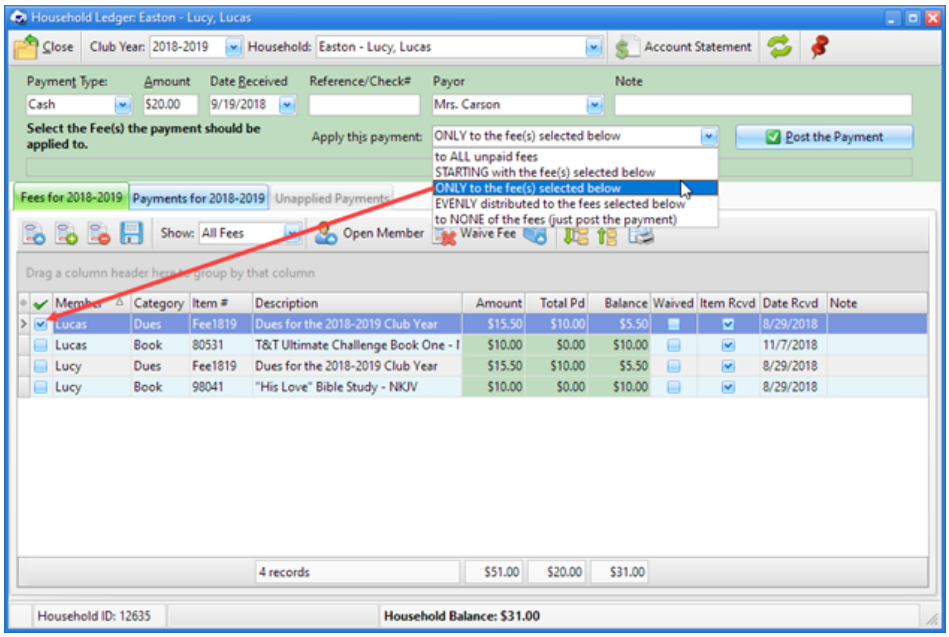
Making a Payment on the Annual Dues Fee

The method described above enters a CASH payment exclusively for dues for the selected clubber. If a payment is received to cover dues for more than one clubber, and/or it is not only for dues but also for books and uniforms, then the payment must be entered through the Household Ledger as follows:



1. Open the relevant family's Household Ledger.
2. Select the **Payment Type** (cash, check, etc), then enter the **Amount**, **Date Received** (defaults to current club date), **Reference/Check#**, **Payor**, and **Note** (if desired).
3. From the **Apply this payment** drop-down list, select "**ONLY to the fee(s) selected below**".

   If more money is received than the amount needed to cover the cost of dues, select "**STARTING with the fee(s) selected below**" so the remaining money goes towards other fees.

4. On the **Fees** tab, check the box next to the dues fee(s) to which the payment should be applied.
5. Click **Post the Payment** to apply the payment.

   The **Post the Payment** button is enabled only after selecting one or more of the fee check boxes.

4.6 Working with Points

Initial Setup

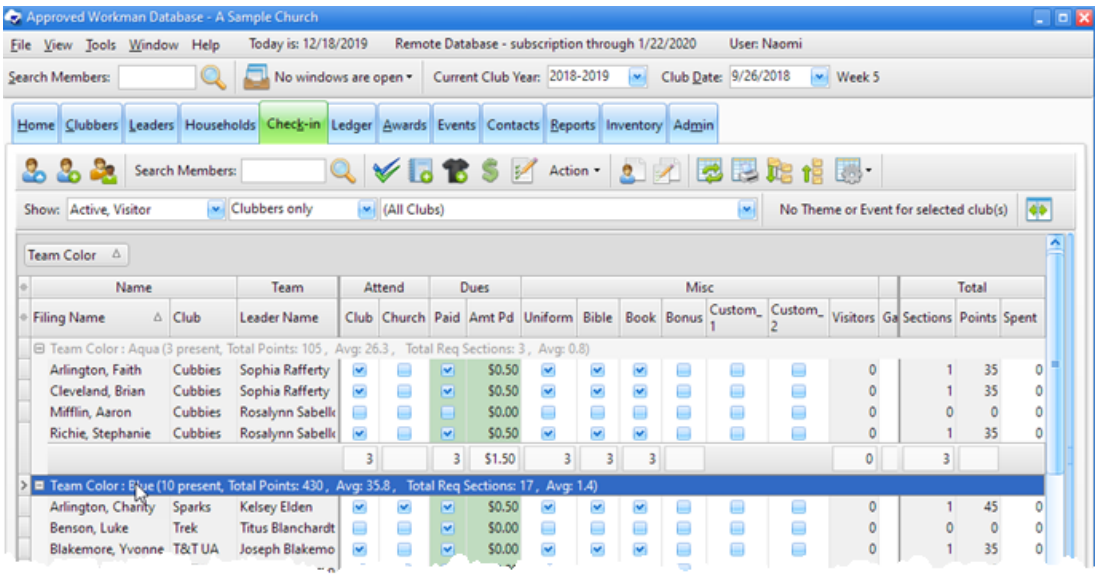
Setup point values for attendance related items as well as required and extra credit handbook sections under **Admin > Club Setup**.

Total Points

During Check-in, attendance and other items are marked. During handbook time, completed handbooks sections are marked. At the end of club, the total points for each clubber can be reviewed or compared.

There are several formal reports that provide information about member's points, such as the Achievement report and the Point List and Worksheet.

The Check-in grid can also be used to analyze points. Sorting, filtering and grouping the data in the grid can identify the clubber with the highest total points within a group or which Team had the highest points; all at a glance without using a calculator! The example below shows grouping by Team Color. The highlighted row shows statistics for the group.



4.7 Working with Awards

Most awards are generated automatically as handbook sections are marked. The award that is triggered when a section, or a group of sections, is completed is determined by records on the **Section Groups and Awards** tab of each Generic Handbook record**.** The award that is triggered when a book is completed is determined by records under **Admin > Awards** > **Book Awards**.

Award descriptions and photos come from corresponding Inventory Items. An Inventory item is listed as an award option when **Use this item as a choice in any AWARD related drop-down list** is selected on the Club Usage tab of the Inventory Item window. The database is initially configured to use the section and book awards suggested by Awana Clubs International. However, for clubs that use different awards, the database allows adding items to the Inventory so those items can be used as awards.

This section covers the basic information related to awards. See the Awards Module for more details.

Creating and Assigning Awards

When sections are marked as completed, either from the Check-in Module or the Member Window's Handbooks tab, awards are automatically created and assigned to a member. When a section or book is completed that triggers an award, the Award Message dialog opens.

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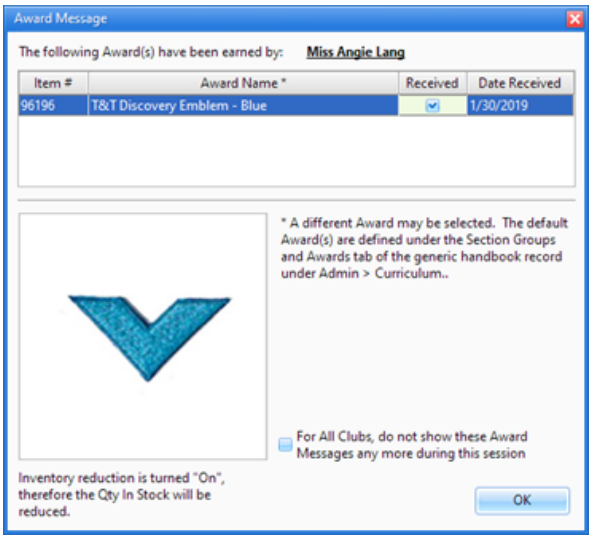


- **Award Name** - description from the Inventory record. A different award can be selected.
- **Received** - indicates the award was given to the clubber; defaults as set up under **Admin > Options > Misc**, but can be changed.

  If the award is pulled and either given to the clubber or labeled for the clubber, mark it as received. If awards are pulled at a later time, don't mark it as received. For book awards that are handed out at the end of the year, leave them as not received. The Award List report can be run or the Awards grid filtered to show all awards that are not yet received to easily identify those that still need to be given out. These are suggestions. We recommend establishing a system that is meaningful and can be implemented consistently.

- **For All Clubs, do not show these Award Messages any more during this session** - allows suppression of all award dialog messages. When Cubbies awards are triggered, there are additional options that will apply to Cubbies only.

  Suppression of the award messages can also be done from the Check-in Module. In the Status bar below the grid, check the box to "**Suppress Award Messages**".

  Suppression of the award messages does not affect the automatic triggering of the award and creation of the award record.

Marking Awards as Received

If an award was not marked as received at the time it was generated, the easiest way to mark it afterward is from the Awards Module grid. Select the desired record(s), then click the **Rcvd** button (or use the right click pop-up menu item). **When marking awards Received, set Date Rcvd to date** field defaults to the current club date, but can be changed if needed before clicking the **Rcvd** button.

Mark multiple award records as received all at once by multi-selecting records.

4.8 Working with Grids

Grids are found throughout the Windows App. They are very powerful. Data entry can be conducted more efficiently and data can be quickly and easily analyzed by sorting, selecting which columns are visible, filtering, grouping, and searching, as well as printing, and exporting data. It is important to understand how to customize a grid to maximize the use of all of the grids in the Windows App.

The following grid related buttons and menu items appear on many toolbars throughout the Windows App:

Icon	Action	Description
	Refresh Grid	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	Print Preview Grid	Displays a preview screen of the data currently in the grid. This then allows printing the grid data.
	Expand All Rows	Expands all of the rows when a grid is grouped or has multiple levels of information.
	Collapse All Rows	Collapses all of the rows when a grid is grouped or has multiple levels of information.
	Grid Options	Access to other grid related options by a drop-down menu.

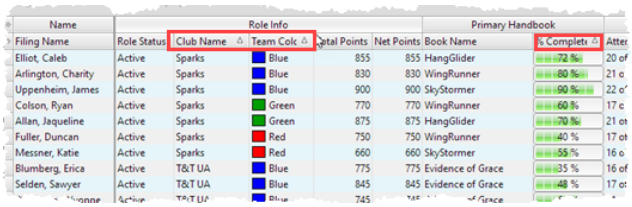
Selecting multiple records

Many grids allow selecting multiple rows before performing an action. Once the rows are selected, choose an action item or button on the toolbar that will then be applied to all selected rows. Use the following to select multiple records:

- Contiguous rows: click on a row, then use SHIFT+Click on another row. All of the rows in between will be selected.
- Non-contiguous rows: click on a row, then use CTRL+Click on any other row(s). The additional rows will be added to the selection.
- All rows: click on a row, then use CTRL+A. All of the rows in the grid will be selected.

4.8.1 Sorting

Clicking on a column header sorts the data in the grid based on that column. One click sorts in ascending order. Clicking again on the same column sorts it in descending order. A triangle appears in the column header to indicate it is sorted and the sort order (up for ascending and down for descending).



Name	Role Info					Primary Handbook		
Filing Name	Role Status	Club Name	Team Colc	otal Points	Net Points	Book Name	% Completi	Atter
Elliot, Caleb	Active	Sparks	Blue	855	855	HangGlider	72 %	20 of
Arlington, Charity	Active	Sparks	Blue	830	830	WingRunner	80 %	21 o
Uppenheim, James	Active	Sparks	Blue	900	900	SkyStormer	90 %	22 o
Colson, Ryan	Active	Sparks	Green	770	770	WingRunner	60 %	17 o
Allan, Jaqueline	Active	Sparks	Green	875	875	HangGlider	70 %	21 o
Fuller, Duncan	Active	Sparks	Red	750	750	WingRunner	40 %	17 o
Messner, Katie	Active	Sparks	Red	660	660	SkyStormer	55 %	16 o
Blumberg, Erica	Active	T&T UA	Blue	775	775	Evidence of Grace	35 %	16 of
Selden, Sawyer	Active	T&T UA	Blue	845	845	Evidence of Grace	48 %	17 o

Data can be sorted on more than one column at a time. To create an additional sort, hold down the Shift Key while clicking in a second column header. For example, to see how the Sparks Teams are progressing in their handbooks: on the Clubbers grid, click the **Club Name** column header, then hold down the Shift Key and click the **Team Color** and then the **% Completed** headers. Each Sparks team is together ordered by the % completed in the handbook.

Sorting leaves all the rows of data in the grid. To limit the records in the grid, apply a filter.

If you always sort the same way, save the grid layout with the sorting options.

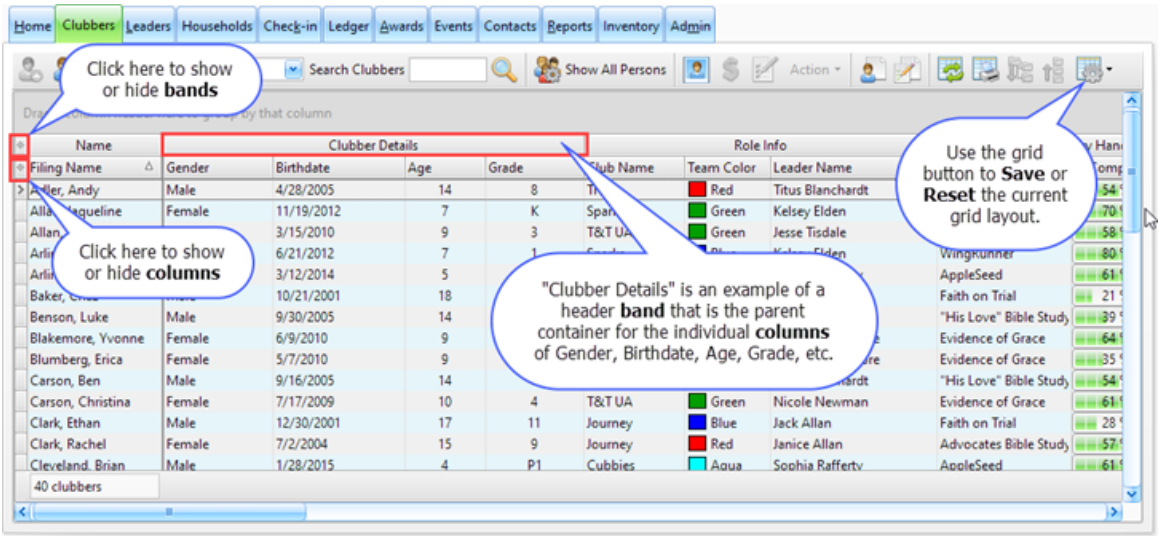
4.8.2 Customizing Visible Columns

Choosing which columns are visible helps reduce or eliminate horizontal scrolling and removes visual clutter so only the desired data is shown.

Save the layout with the preferred columns so the Windows App uses that selection as the default. Temporarily hide columns for an ad-hoc report; then when finished, restore the last saved layout.

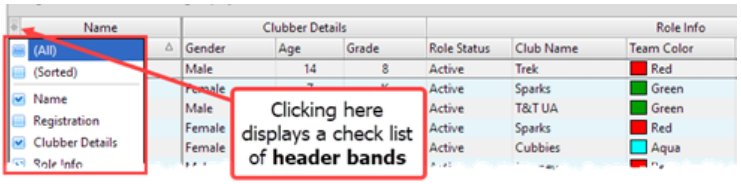
Setting a Column's Visibility

Some grids have two header rows, such as the Clubbers and Check-in grids. The top one is a header **band.** It is a parent container for individual **columns** below it.

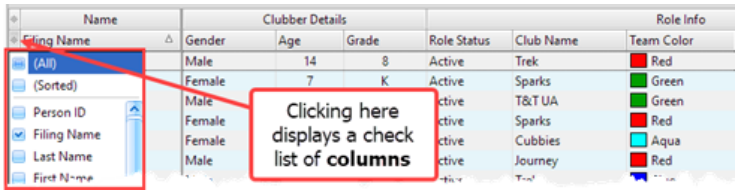


There are two ways to update the visibility of a column:

1. Set the visibility of a **Column Header Band** associated to a column. Click the button to the far left of the header bands. In the list, check the box to show a header band. Clear the box to hide it. Example: in the Clubbers Module, the **Age** and **Grade** columns are associated with the **Clubber Details** header band. Hiding the **Clubber Details** header band also hides the listed columns.



2. Set the visibility of the **Column Header** (the label above each column.) Click the button to the far left of the headers. In the list, check the box to show a column. Clear the box to hide it.



Check the **(Sorted)** box for the list to show in alphabetical order to quickly find a column name.

Moving Visible Bands and Columns

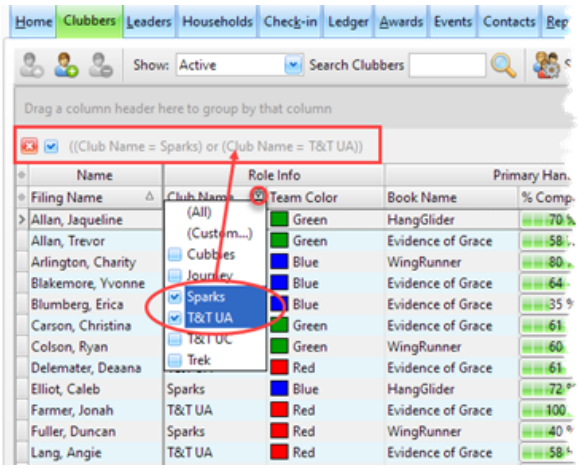
Besides controlling which columns are visible, columns can be rearranged. An entire band can be moved, or a column can be moved within the band. Drag a column or header band to the desired location and drop it when the green arrows appear showing it is a valid drop location.

The width of header bands and columns can also be adjusted. Drag the right side of a header band or a column to adjust the width. When adjusting the width of a column, the width of the header band might need to be adjusted first.

4.8.3 Applying a Filter

Filters selectively limit the rows that are displayed in the grid. Narrowing down the data helps in viewing pertinent information at a glance while disregarding more peripheral data. To apply a filter to a grid:

1. Hover over a column header. A **filter menu** button appears on its right side. Click on the button. A check list of the unique values for the column is displayed.
2. Select one or more check boxes to indicate which records to display. Example: selecting "Sparks" shows only clubbers in Sparks. Clicking "Sparks" and "T&T UA" shows clubbers in either club.
3. When finished, click out of the check list drop-down. The filter is displayed above the grid and the rows of data showing in the grid are adjusted.
4. To remove the filter, click the red **'X'** button next to the filter display above the grid.



- Additional filters can be added by selecting another column value. For example, to see a list of only the Female clubbers in Sparks and T&T UA, click on the filter button in the **Gender** column header, then use the drop-down check list to select "Female".
- To temporarily disable the filter, click the check box toggle next to the filter display above the grid.
- To customize the filter beyond the header drop-down menu options, click the **Customize...** button found on the right side of the area above the grid (with a filter already in use).

Some filters are so common within a Module that they are included as Show drop-down menus above the grid. For example, in the Check-in Module, there is a drop-down menu that allows selection to show Clubbers, Leaders, or Clubbers & Leaders. These Show menus are for convenience and actually provide the same functionality as the column header filters.

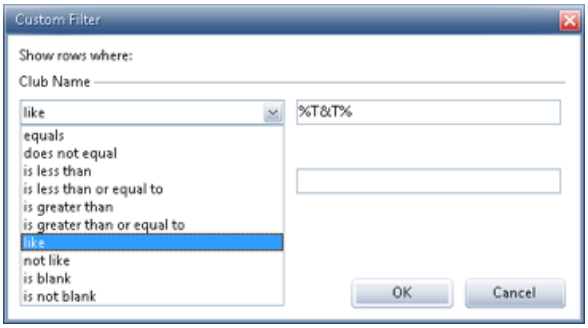
4.8.4 Customizing a Filter

Any column header with **(Custom...)** in a drop-down menu can be customized beyond the options in the check list. This provides great power in filtering the grid to show only select rows of data. When initially creating the filter, one or two simple conditions can be specified.

To add more conditions, or to make changes to an existing filter, use the more advanced Filter Builder tool. Filters can also be saved to use again. To open the Filter Builder tool, click the **Grid** button in the toolbar and select **Custom Filter Dialog**. (Refer to **Changing a Customized Filter** below.)

Creating a Customized Filter

Select the column to filter by and click the filter button to view the drop-down menu. Select the **(Custom...)** option to open a Custom Filter window.

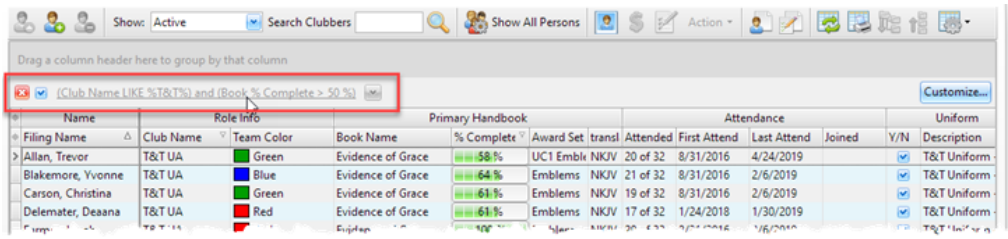


1. Select the operator for the condition from the top left drop-down list.
2. In the field to the right of the operator, if applicable, type the value for the condition.
3. Once this top condition is completed, either click **OK** to run the filter, or add another condition.
4. To set more than one condition for the filter, select the **AND** or **OR** radio button.

   Using AND for the conditions will show only rows of data that meet both conditions. Using OR for the conditions will show all rows that meet either the first condition or the second condition.

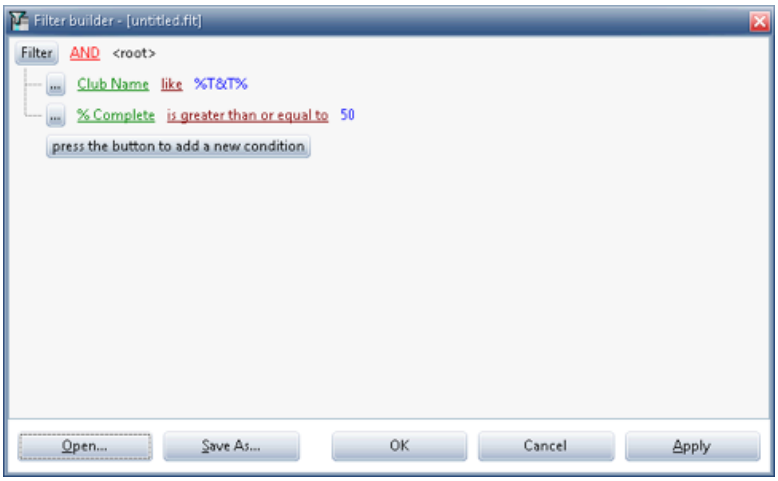
5. Fill in the operator and value for the second condition.

6. Click **OK**. The filter conditions are shown above the grid and the data shown in the grid is adjusted.



Changing a Customized Filter

To make further changes to this customized filter (to add or remove conditions, or tweak the existing ones), click the **Customize...** button in the right hand corner of the area above the grid or select **Custom Filter Dialog** from the Grid menu to open the Filter Builder window.



- To remove a filter condition, click the **'...'** button and select **Remove Row** from the drop-down menu.
- To add a new filter condition, either click the **'...'** button and select **Add Condition** from the drop-down menu, or click **press the button to add a new condition**.
  - The new row will contain a default condition that, in most cases, should be modified.
  - Click on each piece of the condition to modify it.
  - Either click **OK** to apply the filter and close the window, or click **Apply** to check that the filter acts as expected, then **Save** it before dismissing the window.
- To save the customized filter, click **Save As...** and then select where to save this filter, just as with another document.
- To open/reuse a saved filter, first **Create** a filter (see above), then use the **Custom Filter...** button to open the Filter Builder window. Click the **Open...** button and select a saved filter.

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4.8.5 Applying a Grouping

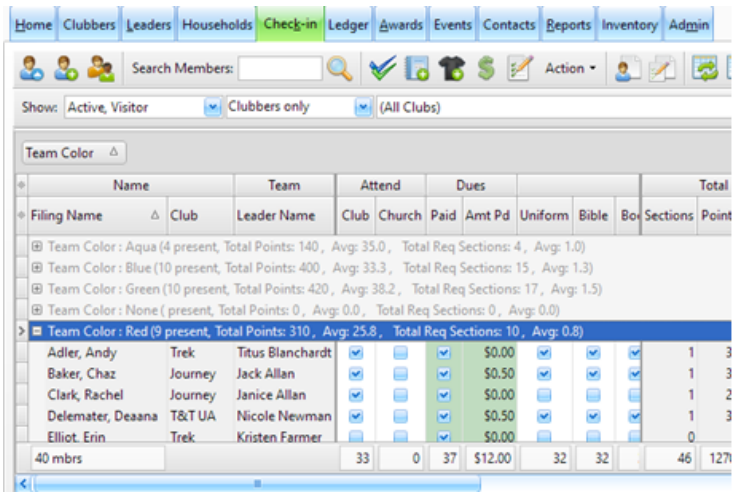
Another powerful tool for organizing and analyzing data within grids is grouping. Grouping records can be done using a single column or multiple columns. It is especially useful for getting record counts for individual groups. For example: How many Sparks are in your club? How many of each gender are in each grade? Using the grouping operation provides these answers in seconds!

To save a small amount of screen space when not using the grouping feature, go to the Grid Menu and uncheck the option to **Show Group By Box**.

If grouping is possible for a grid, the area above the grid will say "Drag a column header here to group by that column". If that is not showing, check the **Grid** drop-down menu to see if it has been hidden.

Drag a column header to use for grouping (the Check-in grid's Team Color, for example) and drop it in the area above the grid. The data in the grid will then be grouped according to the column header.

If a desired column is not currently displayed in the grid, learn how to make it visible.



- To view the individual members within the groups, click the ⊞ toggle to the left of the group to **Expand** the records. Click the ⊟ toggle to **Collapse** the details of the group.
- To add a grouping within a grouping, drag another column header up to the grouping area. (For example, putting the **Gender** column under the **Team Color** column shows how many of each gender are in each color group.)
- To disable a grouping, drag the column header anywhere outside the grouping area. When a large black **X** is shown, then drop it. The column will reappear at its original location within the grid.

Dropping the column header on top of other column headers in the grid will insert the column at that location (which might or might not be desired!)

4.8.6 Searching for Records

There are two methods that can be used to search records within a grid:

- The **Search** tool (available within certain Modules)
- Incremental Search (available within certain columns of certain grids)

To search the entire database, use the Search tool on the Main Window's Toolbar.

Using a Module's Search Tool

There are four modules with **Search** tools: Clubbers, Leaders, Check-in and Inventory. The **Search** tool allows easy filtering of the grid to show only rows that match the Search field. In the Clubbers, Leaders, and Check-in Modules, the filter applies to the **First**, **Last**, or **Preferred** name. In the Inventory Module's Item grid, it applies to the **Item #** or **Description**. To use the tool:

1. Type the text to search for in the **Search** text field.

   When searching for a clubber, type the surname (last), then the first name (i.e. Uppenheim, Kim). The search will not work if the first name then the surname is entered. (i.e. Kim Uppenheim).

2. Press **Enter** or click the **Perform the Search** button. All matching rows are displayed in the grid.
3. To restore the grid, clear the text from the **Search** tool, then press **Enter** or click the **Perform the Search** button.

Doing an Incremental Search

Many grids allow quickly jumping to a record by typing while in the grid. The Clubbers, Leaders, Households, Ledger, and Awards grids allow incremental searching by **Last Name** (but not **First Name**). The Check-in grid allows incremental searching by **Last Name** or **First Name** based on which column has focus. The Inventory grid allows incremental searching by **Item #**. To do an incremental search:

1. Click anywhere in a grid that has incremental searching capabilities.

   On the Check-in List grid, click in the **First Name** column or the **Last Name** column.

2. Start typing either a name or an item number, depending on the grid. The grid will scroll to the first row that matches and the row will be selected.
3. To start a different incremental search, press Esc before typing again.

4.8.7 Printing Grids

The Reports Module includes many useful reports. However, something different than what the formal reports provide might be needed. In this case, the powerful features of the major grids provide access to additional data analysis and output. To print data from a grid as an ad-hoc report:

1. Sort, customize visible columns, and apply filters or groupings to the grid. Only records visible in expanded nodes will be printed.
2. Click the **Print Preview** button in the toolbar to open the Print Preview dialog.

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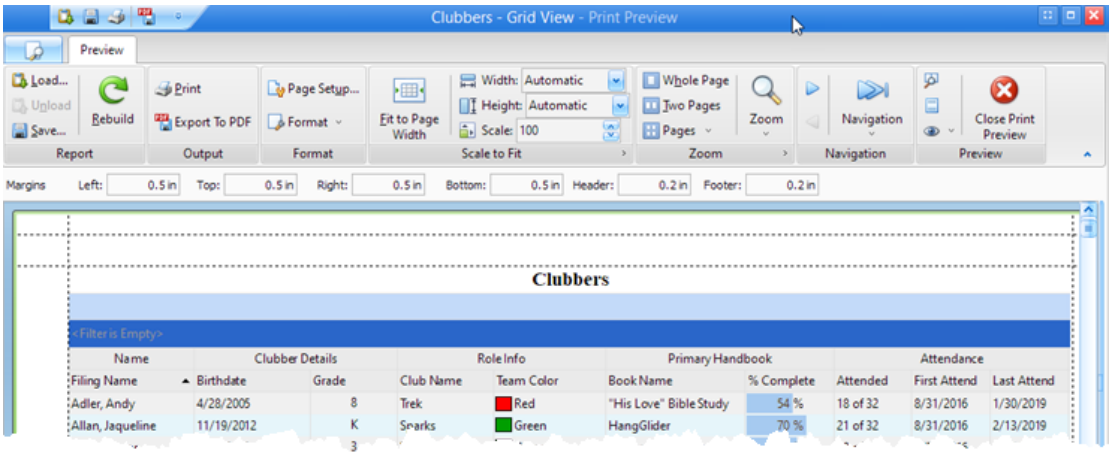


3. Use the **Format** button to add a **Report Title**, **Footnotes**, **Page Numbering**, etc. The toolbar also has other typical tools for managing the printer and page settings before printing.

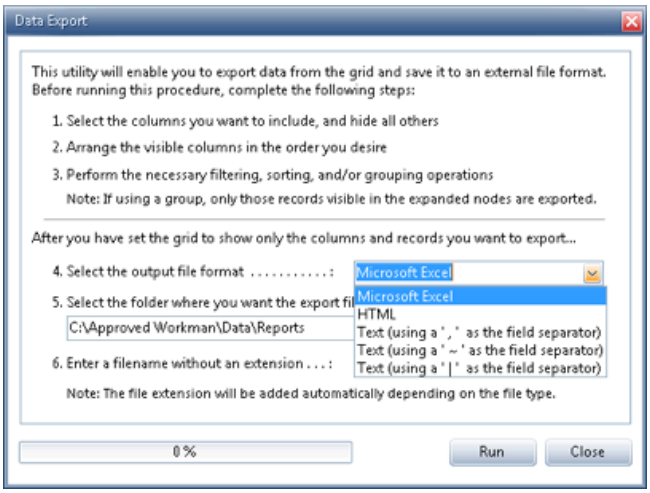
4. After making desired selections, click the **Print** button or use the **Export to PDF** button to create an external file to attach to an e-mail.

4.8.8 Exporting Data from Grids

Save a grid's data to an external file format by exporting the data. Currently, the following formats are supported: Microsoft Excel, HTML, and Text files with ' ~ ', ' | ' or ' , ' used as field separators. Exported data could be used for a mail-merge, importing data into another application or generating a specific report. To export a grid:

1. Sort, customize visible columns, and apply filters or groupings to the grid, then select **Export...** from the Grid menu to open the Data Export dialog:

   If groupings are applied, only those records visible in the expanded nodes will be exported.



2. Select the **output file format** from the drop-down menu.

3. Select the **folder** where the exported file will be saved.

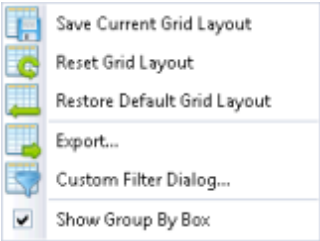
4. Either accept the default **filename** or enter a preferred filename to use when saving the file.

   Do not add an extension to the filename since the Windows App will do that.

5. Click **Run**. The grid's data is exported to a file with the specified name in the specified folder.

4.8.9 The Grid Menu

This menu provides additional items related to the grid.



Working with Grid Layouts

Once a preferred grid setup is created, save the layout so those customizations do not have to be repeated each time that grid is used.

Grid layouts are saved per user. Each person should have a unique user account.

From the **Grid** menu, use the following options to maintain the grid layouts:

- **Save Current Grid Layout** - for the grid layout view that is typically used. When the Windows App starts, the grid defaults to this layout.
- **Reset Grid Layout** - return to the normal/saved layout after the grid layout is temporarily adjusted for a specific task.
- **Restore Default Grid Layout** - return to the original layout set for the grid by the Windows App.

Other Menu Items

- **Custom Filter Dialog...** opens the Filter Builder dialog to create, modify, or open customized filters.
- **Export...** starts the process of exporting a grid's data to an external file.

Grid Display

These options affect how the grid is displayed:

- **Show Group By Box** - show/hide the grouping area displayed above the grid.
- **Use Alternate Grouping Style** - alternate between two styles available for displaying grids with groupings.
- **Use Alternate Color Scheme for Rows -** use a different color for alternating rows in the grid

  Use **Alternate Grouping Style** and **Alternate Color Scheme** options are only available when using the "Native" Style.

Chapter 5

5 Beyond the Basics

Besides tracking the basics like member contact information, attendance, dues, handbooks, sections, and points, the Windows App can also track leader service and training, inventory, household account balances, events, contacts, and more. This section assumes understanding of the topics covered under learning the basics to delve deeper into the robust features of the Windows App.

1. Record service history and training events for leaders to determine if requirements have been met. The Windows App can evaluate attendance requirements to determine if a leader has attended enough weeks to count towards a year of service.
2. Track Inventory by entering your club's current inventory into the database. Once it's initialized, the inventory Quantity in Stock values will be automatically decreased as awards are earned and books are assigned and increased as items on an Order are marked as Received.
3. Manage orders placed with Awana Clubs International including which items have been received or back-ordered. Although the Windows App does not actually make a connection to Awana, the completed order form makes phoning, faxing, mailing or entering the order into the Awana website very simple.
4. Post payments for dues, uniforms, books, etc. to the applicable fees and track which items have been received. By sorting and filtering the Ledger Module grids, totals for received payments, amounts still outstanding, or the total cost incurred to the club for waived fees can be determined.
5. Periodically print Household Account Statements to remind members of the total balance for the items they have received. The statement is customizable, so you can give contact information or details about possible scholarships. Specific Household Account Statements can be printed directly from any family's Household Ledger.
6. Use the Offering field of the Check-in grid to keep track of offering money. The names of the accounts to which offerings can be credited can be customized.
7. Enter a record in the Contacts Module when a leader sends a postcard, makes a phone call or otherwise contacts a clubber.
8. Use the Events Module to track members who attended events and if an award was earned. This is handy for Bible Quizzing and Awana Games participants, for example.

There are often multiple ways to perform the same action. For example, new records can be created by using a **New** button on a toolbar, or pressing **Ctrl+N** within appropriate grids. Also, a record can be opened using the **Open** button, double clicking a row in a grid, using the right click pop-up menu, or by pressing the **Enter** key or the **Ctrl-O** keys while a row is selected. It is not important to know ALL of the ways to perform an action, just the technique that makes sense for you!

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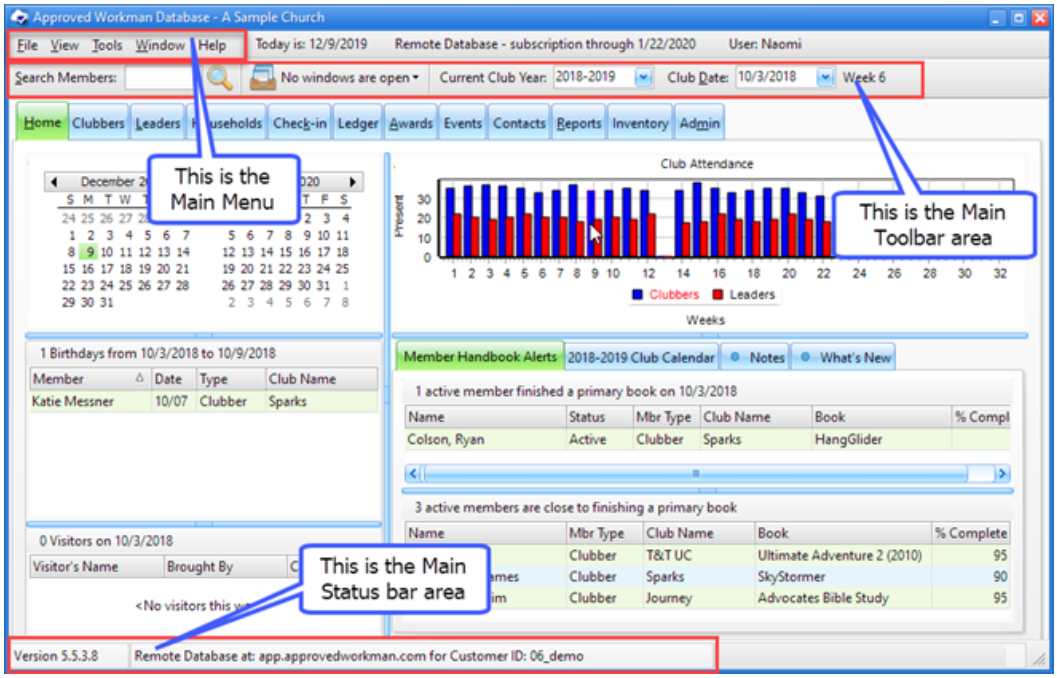
5.1 The Main Window

The Windows App's functionality is organized into distinct modules which are accessible by clicking the Main Window's tabs (Clubbers, Leaders, Households, Check-in, etc.). This makes it very easy to navigate and move from one area of functionality to another. The Main Window also contains the Main Menu bar, Toolbar and Status bar. Features on each of these can be accessed from any module.



The Menu Bar

- Provides access to common menu functions such as File, View, Tools, Window, and Help.
- Displays the **Current Date, Subscription** information and the **Current User**.

The Toolbar

- Provides quick access to any Clubber or Leader record by using the **Search Members** field. Type a few characters of a member's first or last name and press **Enter**.
- Displays a count of Open Windows. Switch to any open window by using the drop-down list.
- Displays the **Current Club Year** and **Current Club Date** as well as providing drop-down lists to change the selections.
- Displays the **Current Week Number** (and "last week of quarter", if applicable).

The Status Bar

- Displays **Version** information, the **Customer ID** for the remote database, and a progress bar when needed.

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5.1.1 The File Menu

The following items are included in the Main Window's **File** menu:

Icon	Action	Description
	Close All	Closes all open windows.
	Switch Users	Logs out the current user and provides a log-in screen for another user to log in without exiting the database.
	Exit (Ctrl+Q)	Shuts down the database.

5.1.2 The Tools Menu

The following items are included in the Main Window's Tools menu.

Icon	Action	Description
	Attendance Awards	Generates church and club attendance awards.
	Club Store	Provides a tool to manage Club Store tasks such as looking up accumulated points and entering points spent.
	Gather E-mail Addresses...	Collects e-mail addresses or textible phone numbers based on selection criteria.
	Inventory Quick Reference	Provides a resource to quickly search for an inventory item that is "In Use".
	Manage Photos	Provides a way to work with the photos for all members.
	Show Users..	Displays a list of all users that are currently logged in to the database.
	Data Import	Imports data from an external file for either an initial data load or for updating records from online registration.
	SQL Workbench	Provides an interface for querying the database using SQL statements.
	New Year Setup	Provides an interface for setting up a new club year in the database.
	Change Password	Allows the current password to be changed to a new one.
	Show OS Version	Displays the version number of the computer's Operating System.

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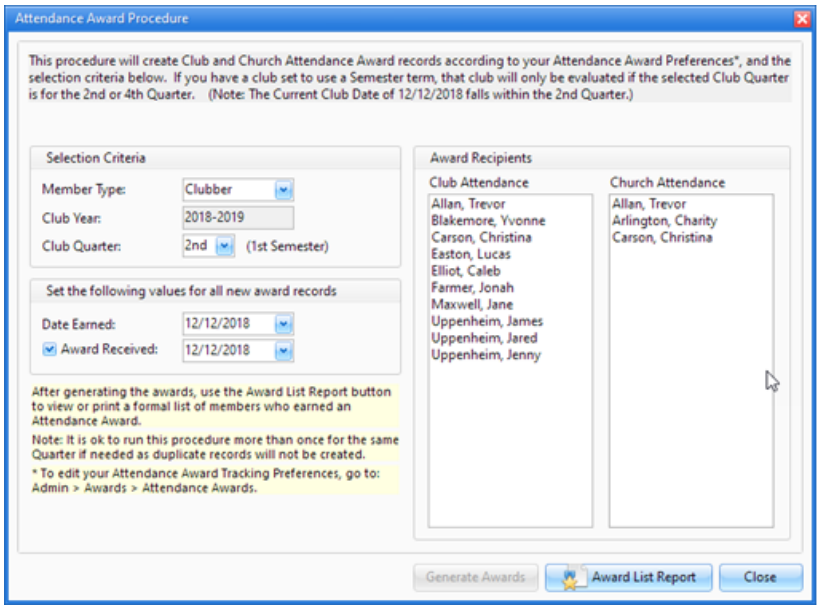
5.1.2.1 Attendance Awards

On the last week of each quarter or semester, a reminder to generate Club and SS/Church Attendance Awards is triggered. Use the Attendance Awards procedure to easily do this, as follows:

The awards are generated based on the settings under **Admin > Awards > Attendance Awards**.

1. Select **Tools > Attendance Awards** from the Main Window's menubar.



2. Set the **Selection Criteria** - select values for: **Member Type,** and **Club Quarter.** The **Club Year** shows the **Current Club Year** from the Main Toolbar and is read-only.
3. **Set the following values for all new records:**
   - **Date Earned** - defaults to the current week, but can be changed.
   - **Award Received** - indicates if the awards should be marked as being Received by the members when the award is created. Checking the box enables the date **Received** field.

   If not marking awards as received, easily mark them as received later from the Awards module.

4. Click **Generate Awards**. Awards are created for members that meet the criteria. Names are shown in the **Award Recipients** area. Message dialogs indicate the number of recipients and the number of records created.

   The procedure will not generate duplicate awards even if it is run multiple times.

   Excused absences: To review attendance for a member, open the individual Member record and look at the Attendance tab. To excuse an absence, make Attend Excused and SS Attend Excused columns visible (they are normally hidden). Check the box to excuse attendance, then rerun the procedure. Attendance can also be excused from the Check-in grid.

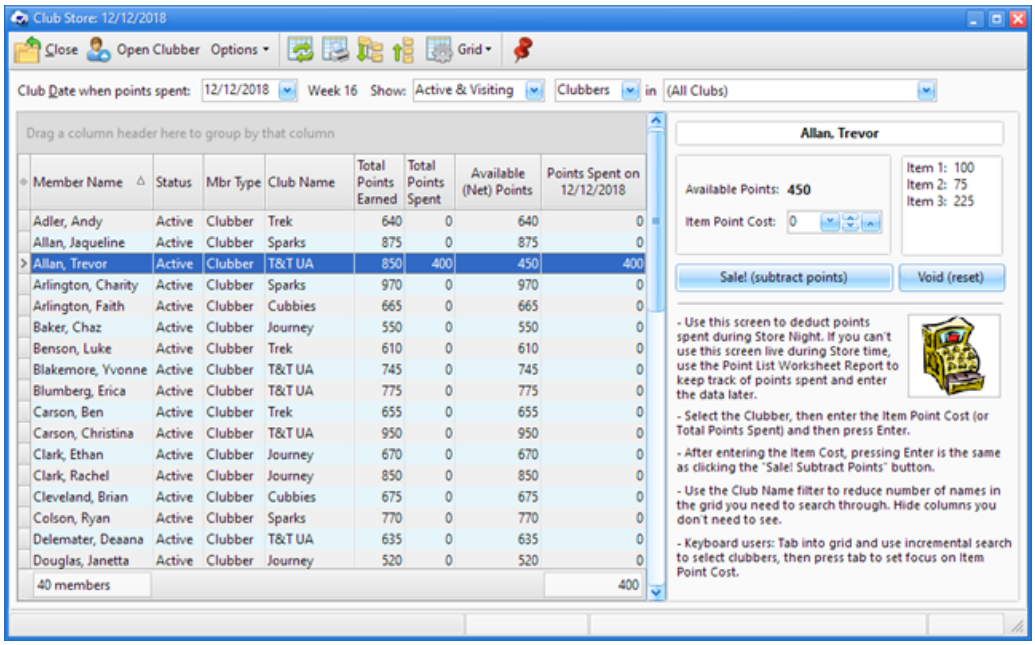
5. Click **Award List Report** if a formal report is desired and **Close** when finished.

5.1.2.2 Club Store

Use this tool to see how many points a clubber has to spend and to deduct points that are spent, as follows:

The Point List and Worksheet can be used for reference and to track points spent for later data entry.

1. Select **Tools > Club Store** from the Main Window's Menu bar.



2. Set the **Club Date when points spent.** It defaults to the current club date, but can be changed.
3. Use the **Show:** drop-down lists to filter by **Status**, **Member Type** and/or **Club**. The grid can also be manipulated as explained in working with grids.
4. Select a clubber in the grid on the left. The clubber's information will be shown on the right.
5. Enter the **Item Point Cost** (or total points spent) for the items purchased.
6. Press **Enter** or click **Sale**. The clubber's **Net Points** are decreased and **Points Spent** are increased. Click **Void (reset)** to revert to the original **Net Points** with zero **Points Spent**.

The following common functions can be accessed using buttons on the window's toolbar:

- **Open Clubber -** opens the Member Window for the selected clubber to get more details
- **Options** - choose to **Set focus to Item Point Cost after selecting clubber**, and/or **Set focus back to the grid after pressing Enter**
- **Stay On Top -** a toggle button that is either selected or not. When it is selected, the Club Store window remains in front of the Main Window. When not selected, use the **Window** menu or the Window Manager list in the Main Window's toolbar to return the hidden window to the front.

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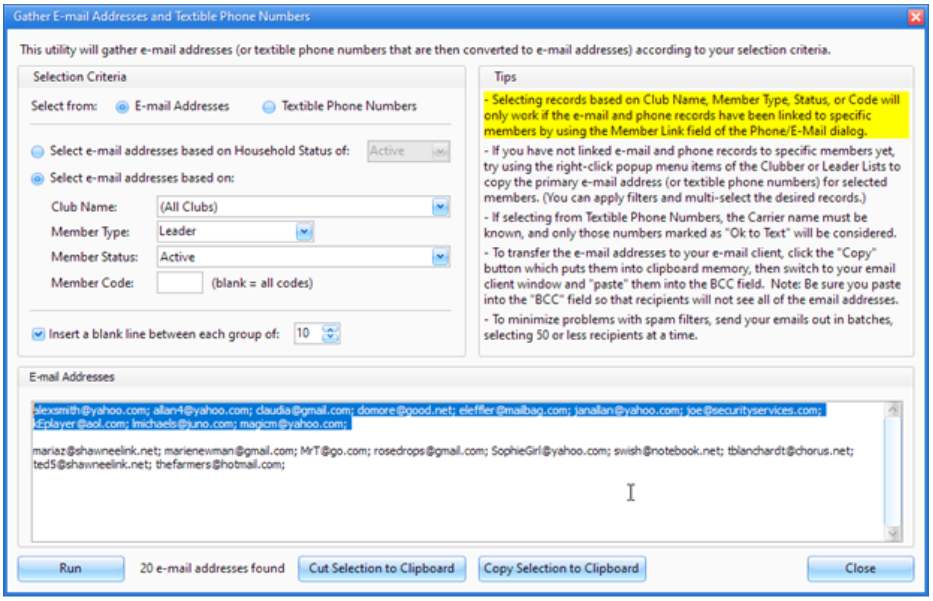
5.1.2.3 Gather E-mail Addresses and Textible Phone Numbers

Use this tool to gather e-mail addresses or textible phone numbers (that are converted to e-mail addresses). The carrier domain name is appended to each textible phone number. The results can be copied to clipboard memory, then pasted into the BCC field of an e-mail client. To use the Gather E-mail Addresses and Textible Phone Numbers tool:

1. Select **Tools > Gather E-Mail Addresses.....** from the Main Window's Menu bar.



2. Set the **Selection Criteria:**

   - **E-mail Addresses** or **Textible Phone Numbers**

   If selecting from Textible Phone Numbers, the Carrier name must be known and only numbers marked as "Ok to Text" are considered. See the E-Contacts dialog for more details.

   - **Household Status** or **Club Name, Member Type, Member Status,** and/or **Member Code**

   For selection based on Club Name, etc, a **Member Link** must exist on the Phone/E-mail dialog.

   - Choose to **Insert a blank line** and set the number to include in each group.

3. Click **Run**. The results are displayed in the **E-mail Addresses/Textible Phone Numbers** area.

4. Choose **Copy All to Clipboard** or select a group and choose **Cut Selection to Clipboard** or **Copy Selection to Clipboard**. Switch to an e-mail client and **Paste**.

   Do NOT paste all the addresses into the **To:** field; instead, paste them into the **BCC:** field.

   The preferred type of e-mail separator can be set for each user under **Admin > Users**.

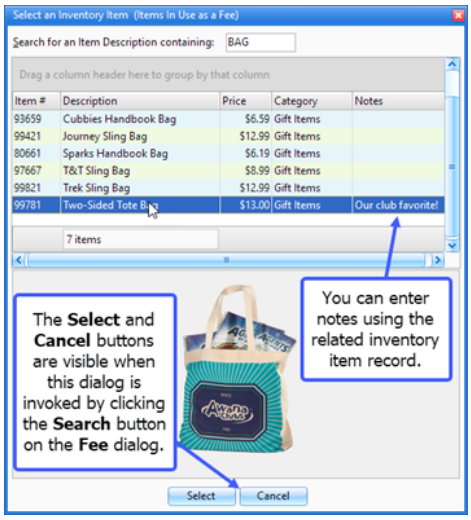
5. Click **Close** when finished.

E-mail addresses or textible phone numbers can also be collected from the Clubbers or Leaders grids. Filter and multi-select rows, then use **Action > Copy** (email or textible phone).

5.1.2.4 Inventory Quick Reference

Use this tool to quickly find an Inventory Item. To use the Inventory Quick Reference tool:

1. Select **Tools > Inventory Quick Reference** on the Main Window's Menu bar.



2. In the Search box, type a few characters from the **Description,** such as "unif" for uniforms, or "bag" for handbook bags. Matching records are shown in the list. To make it even easier to find favorite items, add a **Note** (like "club favorite!") to the Inventory Item records.

3. Once the particular item is located, use the right click pop-up menu to **Copy the Item Number, Copy the Description** or **Open the Inventory Item**

The Inventory Quick Reference dialog can be re-sized so it is narrow. Also, it is not modal, so it can be moved over to the side and left open while continuing to work on other screens.

When opened from the Fee dialog's **Search** button, **Select** and **Cancel** buttons are also displayed.

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5.1.2.5 Data Import

Use this utility to import data from an external file for either of the following two scenarios:

1. **Initial Data Load:** bring data into a new (empty) database
2. **Online Registration:** add or update existing records with a data file from an online registration website. (For existing users of the database.)

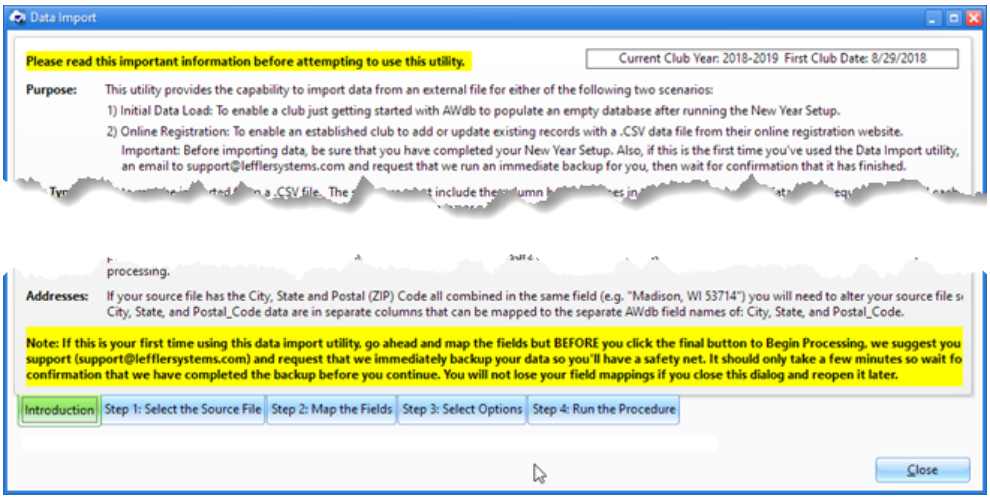
Run the New Year Setup before importing registration data.

For first time users of the Data Import, contact support and request a backup, then wait for confirmation before continuing.

Introduction

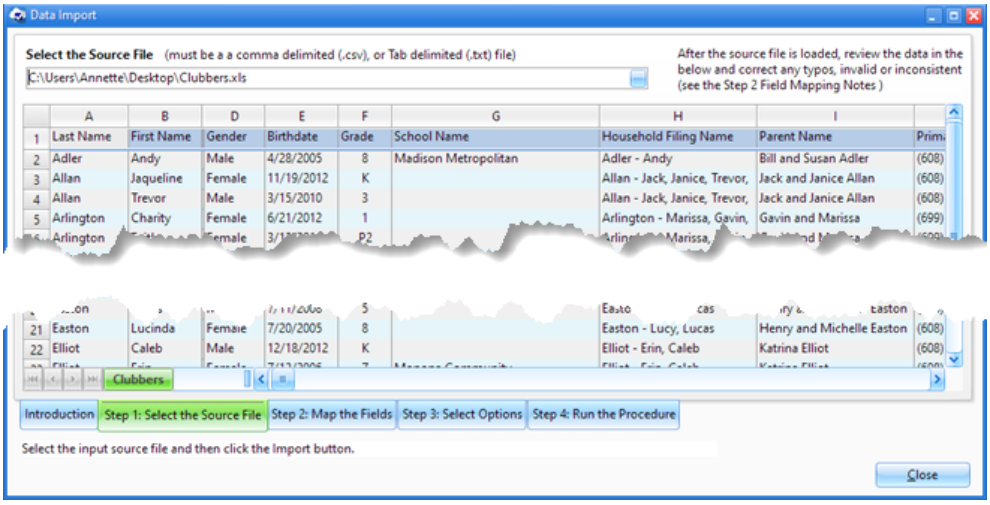
The Introduction page provides important information about **File Types**, **Limitations** and **Club Names**, as well as tips **For Best Results** and format information for **Addresses**.

Please read this page carefully! Not reading the instructions could result in problems with your data.



Step 1 - Select the Source File

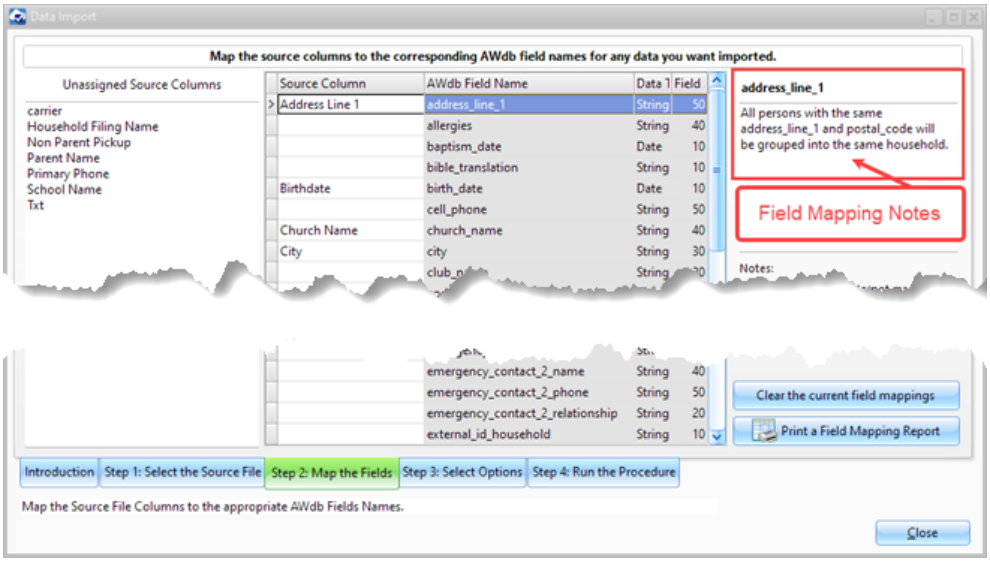
Identify the source file to be imported. After the file is loaded, review the data in the grid and correct any typos and invalid or inconsistent values. See the **Field Mapping Notes** in Step 2 for specific requirements of each field. Return to Step 1 to edit data as needed.



Step 2 - Map the Fields

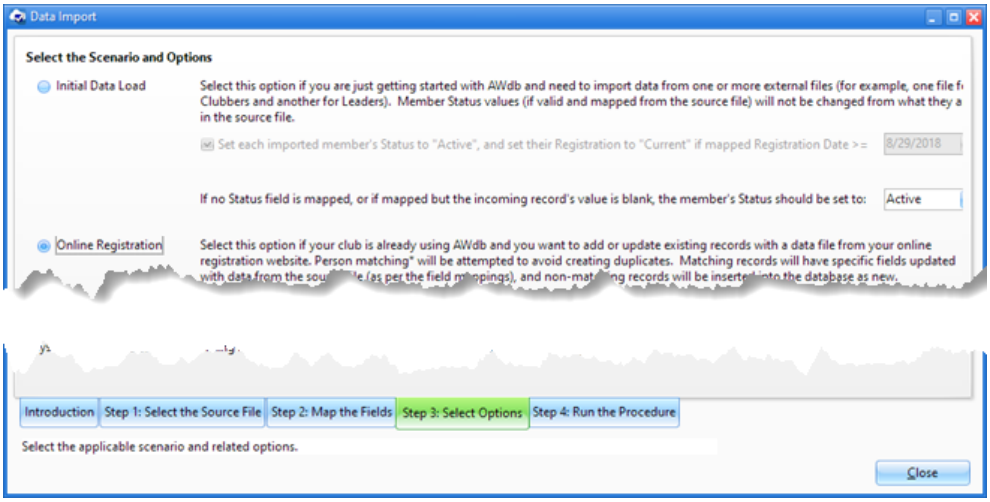
Map the source columns to the corresponding database field names. On the left is a list of the **Unassigned Source Columns**. In the grid, identify the **Source Column** for a database **Field Name.** Information about **Data Type** and **Field Size** are given as well as specific information about mapping the source data to that field.

Please read the mapping notes carefully to assure data is formatted correctly and you understand how each field is used.



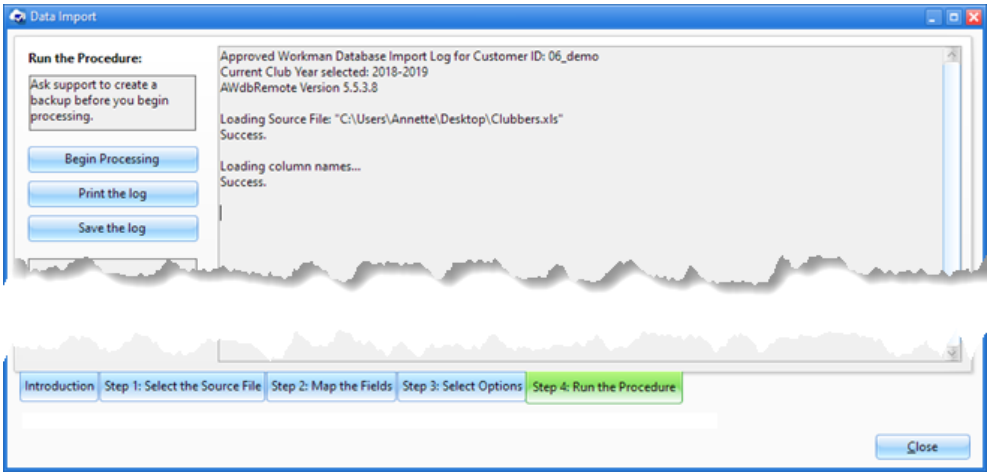
Step 3 - Select Options

Choose from an **Initial Data Load** or **Online Registration** scenario. Detailed descriptions are included as well as **Important Notes**.



Step 4 - Run the Procedure

Once the setup is complete, run the Data Import Procedure.

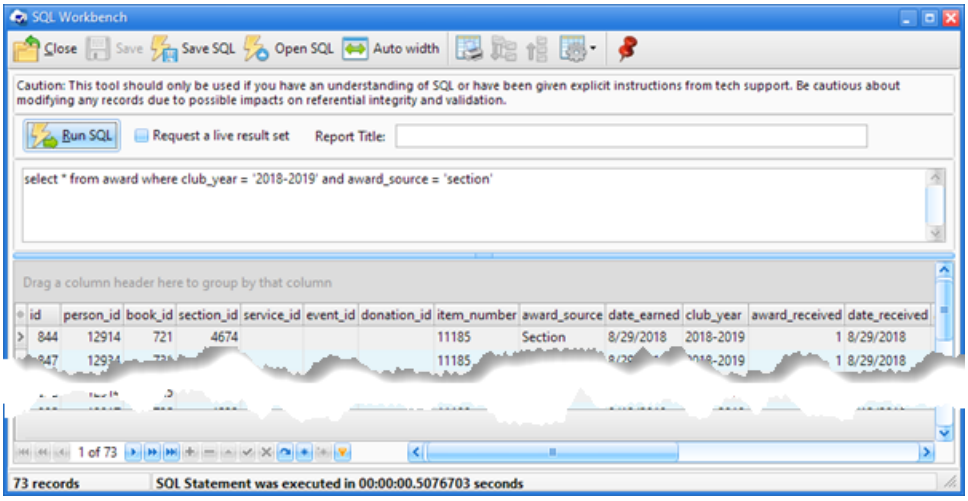


- Read reminders and heed any warnings, then click **Begin Processing**. A log is generated.
- When complete, review the log for items that need attention. **Print** or **Save the log** for reference.
- Click **Close** when finished.

5.1.2.6 SQL Workbench

Even though the Windows App is very robust and provides lots of ways to view and analyze data, there might occasionally be times when you want to see data in a different way. The SQL Workbench provides an interface for querying the database using SQL statements. To see ways other users use this feature, visit the Approved Workman Forum and have a look at the SQL Workbench topic.

Only use this tool with knowledge of SQL or with explicit instructions from Customer Support.



Icon	Action	Description
	Close	Closes the SQL Workbench without saving current changes.
	Save	Saves any changes made in the "live result set". The **Save** button is only enabled if the **Request a live result set** is selected.
	Save SQL	Saves the SQL statement that is currently displayed to a file to easily open it and run it again at a later time.
	Open SQL	Opens a SQL statement that was previously saved to a file.
	Auto Width	Automatically resizes the grid's columns to best fit the data that is displayed.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.
	Stay On Top	Toggles whether or not the window stays on top of the main window.
	Run SQL	Runs the current SQL statement and displays the results in the grid.

- To edit the data, check the **Request a live result set** box then click **Run SQL** again. This allows changes to be made in the grid and enables the Save button to keep the changes.

  Again, be cautious about modifying any records due to possible impacts on referential integrity and validation.

- If the grid's data is going to be printed, specify a **Report Title** to be used.

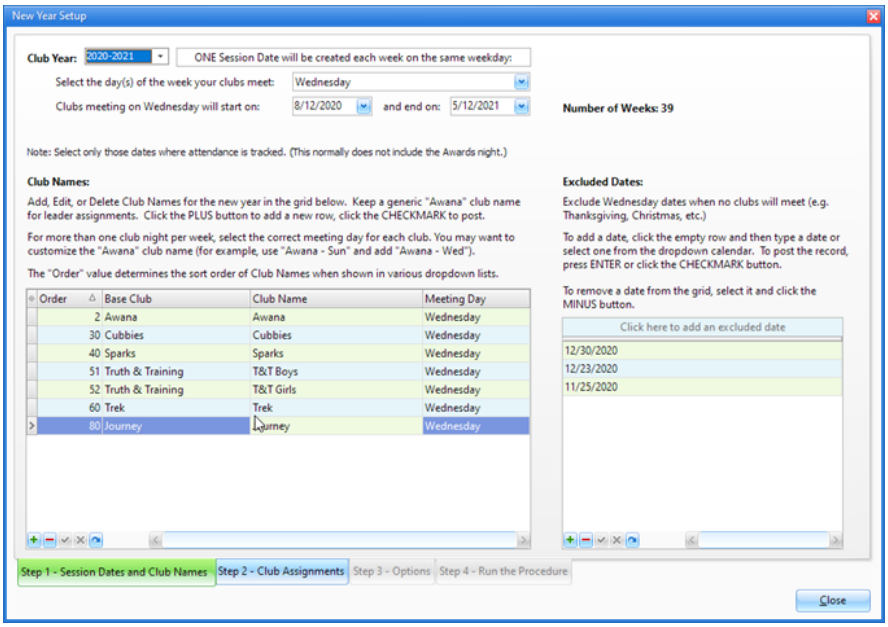
5.1.2.7 New Year Setup

The New Year Setup procedure (NYS) prepares the database for a new club year. There is no formal process or work that needs to be done to close out the prior year. Access the NYS from the Tools menu or from a button on the toolbar under Admin > Club Setup > Club Calendars.

Please read the following instructions carefully! They contain important reminders. Not reading the instructions might result in problems with the database in the future.

Step 1 - Session Dates and Club Names

Set up the club dates and active clubs for the upcoming year.



When the Club Year is selected, the meeting day selection will be displayed. Selected of the meeting day enables the start and end date. Completion of the end date enables the additional sections.

Club Year:

1. Select the upcoming **Club Year** from the drop-down menu. A note appears in the field next to the **Club Year** stating "ONE Session Date will be created each week on the same weekday".
2. Select the day(s) of the week your clubs meet from the drop-down menu. For clubs that have groups meeting on different days of the week, select all that apply.
3. Select the **Starting Date** and **Ending Date** from the respective drop-down calendars.

Awards Night is generally not included in the Ending Date since records of sections, attendance, points, etc. are not tracked.

The number of weeks between the start and end dates is shown (not reflecting excluded dates). A club year is generally 32 - 36 weeks. A maximum of 51 weeks may be selected.

Club Names:

Setup active clubs. The initial list of clubs in the grid defaults to the those from the prior Club Year. Make changes as follows:

- Edit the **Meeting Day** field to assign a club to a different day of the week.
- Change the **Club Name** for existing clubs.
- Add personalized clubs. Click **'+' (plus)** at the bottom of the grid. Enter a number in the **Order** field. (This determines the sort order for drop-down lists.) Select a **Base Club** and enter the personalized **Club Name**.
- Remove clubs that are no longer offered. Select the club's row and click **'-' (minus)** at the bottom of the grid.

We recommend keeping the "Awana" base club to assign leaders to who don't serve in specific clubs (Commander, Secretary, etc.).

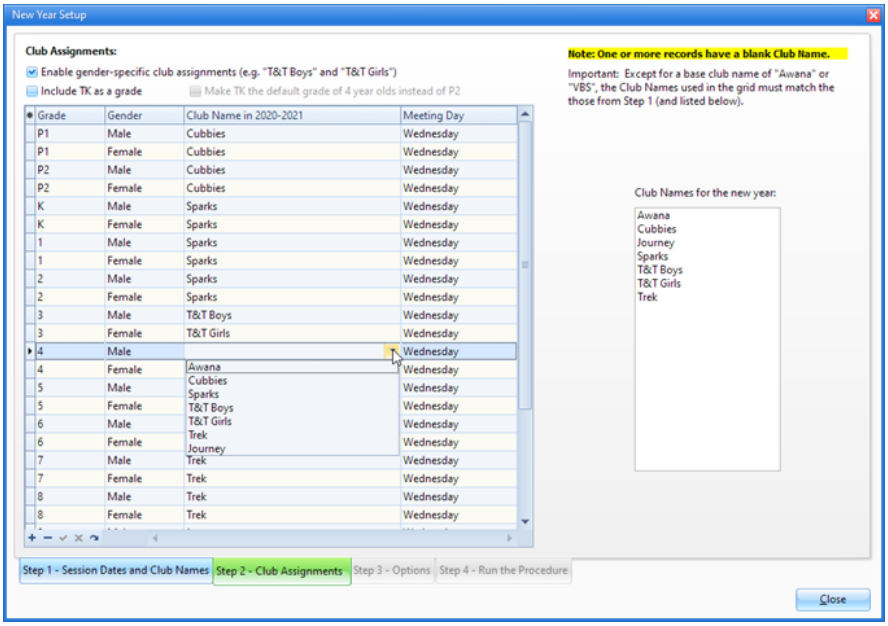
Excluded Dates:

Indicate which dates there will be no club, such as during Thanksgiving, Christmas, and Easter breaks.

- To exclude a date: click in the blank grid and use the drop-down calendar or type in the date. Click the small **checkmark** below the grid. Repeat for additional dates.
- To remove a date from the list: select the row and click the **'-' (minus)** button.

Step 2 - Club Assignments

Set up club assignments based on grade and gender. All Club Names listed in the box on the right should be included in the grid (except Awana which is used for leaders). There must be a single club assignment for a specific grade and gender combination.



If you do not include "Boys" or "Girls" in any Club Names, "enable gender-specific club assignments" will not be checked. The Club Name for the Grade will apply to both genders. To see the gender-specific records, check the box.

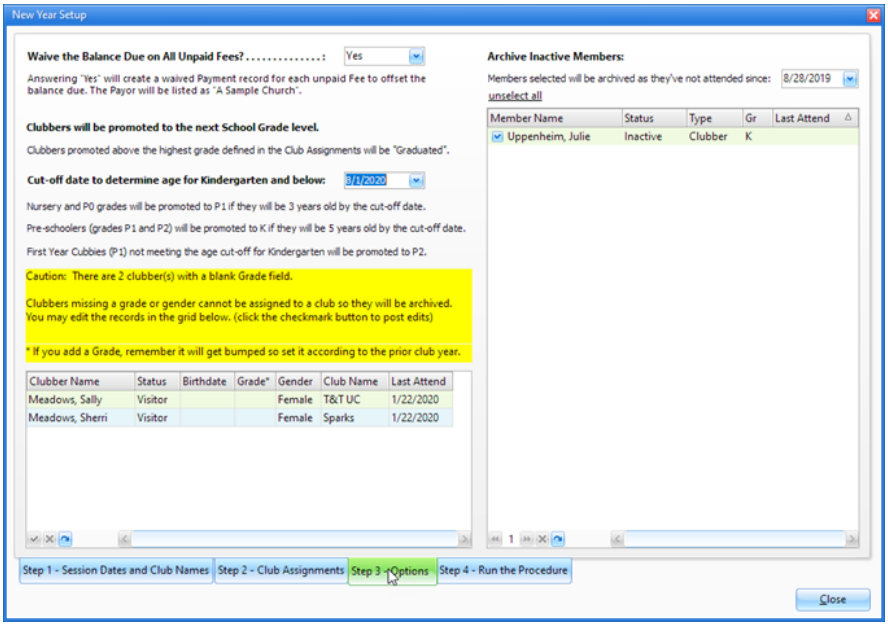
For areas of the country that have Transitional Kindergarten (TK), check the box to include TK as a grade selection. There is an additional option to make TK the default grade for 4 year olds instead of P2.

Change a **Club Name** by clicking in the cell and using the drop-down options. For blanks, use the drop-down list to select the correct Club Name.

Add records for Club Names added in **Step 1**. Click **'+' (plus)** to create a blank row. Select the **grade**, **gender**, and **club name** from the drop-down menus. When finished, click the small **checkmark** below the grid to save the record.

Step 3 - Options

Select optional items for the new year setup to handle.



Fees

The new year setup process can optionally waive the balance due on all unpaid fees. Select **Yes** or **No**. Selecting yes will create a waived payment record of each unpaid fee to offset the balance due. The Payor will be listed as indicated under **Admin > Options > Fees and Dues**.

Promotion

Clubbers with a grade of Kindergarten or higher will automatically be promoted to the next grade.

Clubbers promoted above the highest grade defined in Club Assignments will be "Graduated".

Clubbers with a grade below Kindergarten will be evaluated based on age. Select the **Cut-off date** that should be used for this evaluation. Nursery and P0 will be promoted to P1 if they will be 3 years old by the cut-off date. Pre-schoolers (P1 and P2) will be promoted to K if they will be 5 years old by the cut-off date. First year Cubbies (P1) not meeting the age cut-off for Kindergarten will be promoted to P2.

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Missing Grade/Gender Information

Without a grade and a gender a clubber can't be assigned to a club resulting in the clubber getting archived. If there are clubbers missing a Grade or Gender, a yellow highlighted section will be shown. Those members will be listed in a grid with a few pieces of helpful information.

Enter missing information in the grid and use the small **checkmark** at the bottom to save the change.

When entering a grade, set it for the prior club year as the clubber will be promoted during the NYS.

Archiving

During the NYS, all members with a status of active or visitor will be set to inactive. This facilitates tracking registration to know who is active in the new club year. If there are a large number of members that were already inactive in the previous club year, this could make it difficult to locate returning members. We recommend that inactive members from the previous club year get archived. The members will still be in the database, but are not included in most grids and reports.

Select the last attend **Date** to use in determining which members should be archived.

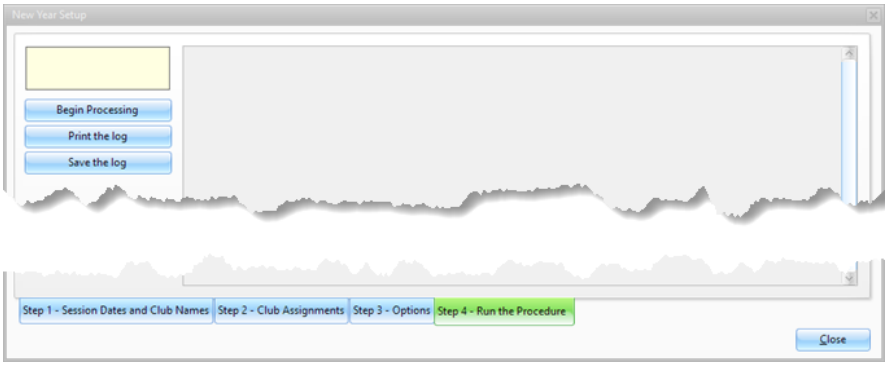
We recommend the first date of the previous club year. This will archive a member that was set to inactive during the prior new year setup who has not attended during the entire club year. Another suggested date is January 1 of the current calendar year. This will archive members who attended at the start of the club year, but did not continue coming. Other dates may be selected.

The grid shows the list of suggested members to archive based on the date selected along with details such as **Status**, **Type**, **Grade**, and **Last Attend** date. A checkbox is shown next to each listed member. All members with the box checked will be archived.

Checking the box in the Member Name header selects all records. Unchecking it clears the box for all members. Individual boxes may be selected or cleared to customize which members should be included. The grid can be filtered or sorted to assist with selections.

Step 4 - Run the Procedure

Use this page once all of the setup is complete to run the process.



1. After reading any reminders on the screen, click **Begin Processing**. A log is generated during the processing.

2. Once the NYS is complete, review the **log** to confirm that it updated records as expected. **Print** or save the log if desired. The last page may be used as a check list of items to review for the new club year.

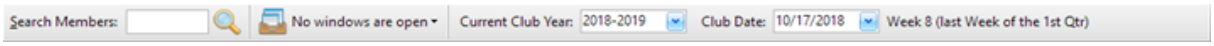
3. Complete preparation for the New Year by reviewing details under the Club Setup section.

5.1.3 The Help Menu

The following items are included in the Main Window's Help menu.

Icon	Action	Description
	Online User Guide	Links to the online User Guide. An internet connection is needed.
	License Info	Opens the license information including Customer ID, expiration date and number of users.
	Approved Workman Forum	Links to the Forum which is an excellent place to get questions answered and see how others use the database.
	Approved Workman Website	Links to the home page of the Approved Workman website.
	Remote Support Portal	Links to the remote support portal to connect with Customer Support for scheduled remote sessions so a support team representative can view your machine to answer questions or troubleshoot problems.
	About...	Provides a bit of information about the Approved Workman database.

5.1.4 The Toolbar

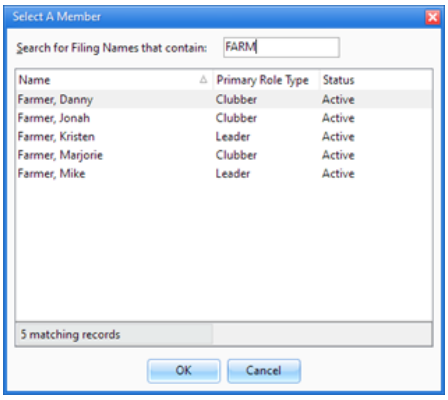


Search Members

Use this tool to quickly locate and open a member from anywhere in the Windows App. It is on the left side of the Main toolbar and is available from any module. To use **Search Members** :

1. Type a few characters of the first or last name of any member in the **Search Members** text box.

2. Press **Enter** or click the **Perform Search** button. If a single member matches the criteria, that member's record is opened in the Member window. If there are multiple matches, the Select A Member dialog opens showing all members whose first or last names contain the entered text.



3. If the desired member is listed, open the member record by double clicking or selecting the name and clicking OK. If there are still many names displayed, narrow the list by continuing to type in the **Search for Filing Names that contain:** field. The list will update as characters are typed.

4. Click **Cancel** to discontinue the search without selecting a member.

Window Manager

The following records open in separate windows and can remain open while using the Windows App: Members, Household Ledgers, Items and Orders. These windows are sometimes hidden by other windows on the screen. The Window Manager drop-down menu helps navigate them easily. It shows **No files are open** or **[#] windows are open** and lists each one in the drop-down menu. Select a window from the list to bring it to the front of the screen.

The Main Menu bar's **Window** menu also lists the opened windows along with options for organizing the windows, such as: Cascade All, Minimize All, Restore All.

Current Club Year

The **Current Club Year** should be set to the desired year for viewing or creating data. Only the data pertaining to that year is displayed throughout the database. This is normally the current calendar club year, but to view or modify historical data, switch to a prior club year.

Club Date

The **Club Date** should be set to the current date to enter data during club time. For a club date in the past, change to the applicable date. This date is used as the default value in many modules where a date is a required field. For example, in the Check-in Module when a handbook section is completed.

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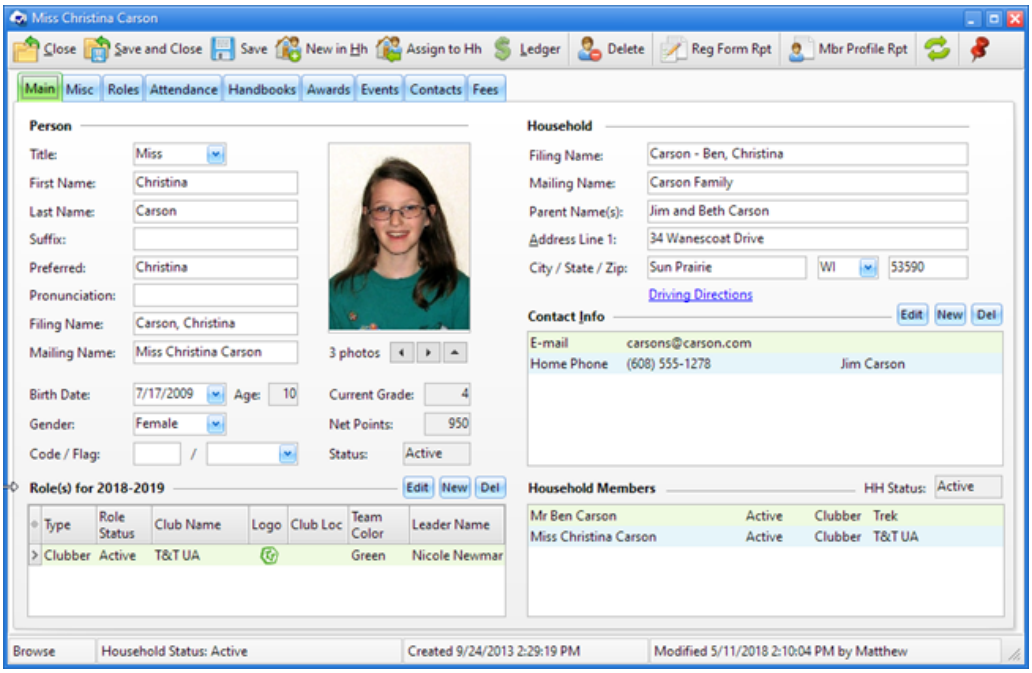
5.2 The Member Window

The Member Window provides a way to view and modify all a member's data in a single window. Multiple Member Windows can be open at one time. Easily switch between them using the Main Window toolbar or **Window** menu. **Stay on Top** (the red push pin) keeps a window on top of the Main Window.



There is a lot of information packed into this one window, so it is divided into tabbed pages:

- **Main** - basic information, such as person, role, household, contact, and household members
- **Misc** - other useful information about the member, such as permissions, medical info, visitor records, misc household info, and notes
- **Roles** - overview of all of the member's roles in your club; includes details about teams, registration, and uniform
- **Attendance** - all attendance related information for each club date, such as club and church attendance, weekly dues, offerings, etc.
- **Handbooks** - all handbooks assigned to the member. Manage handbooks and mark sections complete. Review percentage completed and date completed for each handbook.
- **Awards** - all awards earned by the member. Open, delete, or create awards (most awards are created automatically when marking sections complete) as well as set the received status.
- **Events** - all events attended by the member. Open, delete, or create new event records.
- **Contacts** - all records of contacts made with the member. Open, delete, or create contact records.
- **Fees** - all fees for the member. Open, delete, or create new fee records.

Fees for Dues are created automatically when Registration is set to "Current". Fees can be set to be created automatically when assigning a book or a uniform.

5.2.1 The Toolbar

The Member Window's main toolbar provides buttons for the most common functionality. Other toolbars might appear in the tabbed pages for additional functionality for the selected page.

The table below describes what each button on the toolbar does.

Icon	Action	Description
	Close	Closes the Member window without saving current changes.
	Save and Close	Saves the changes and then closes the Member window.
	Save	Saves the changes and leaves the Member window open.
	New in Hh	Opens the Member Window with some pre-filled values to create a new member (clubber or leader) in the selected household. This is the most efficient way to add members to an existing household.
	Assign to Hh	Assigns the selected member to a different household based on selection from a list of all households.
	Open Household Ledger	Opens the Household Ledger for the selected member's family to manage fees and payments.
	Delete Member	Removes the current member and closes the window. This process requires a confirmation.
	Print Registration Form	Opens the Registration Form report dialog to print a registration form for the selected member's family.
	Print Member Profile	Opens the Member Profile report dialog to print a member profile for the current member.
	Refresh	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	Stay on Top	Toggles whether or not the window stays on top of the main window.

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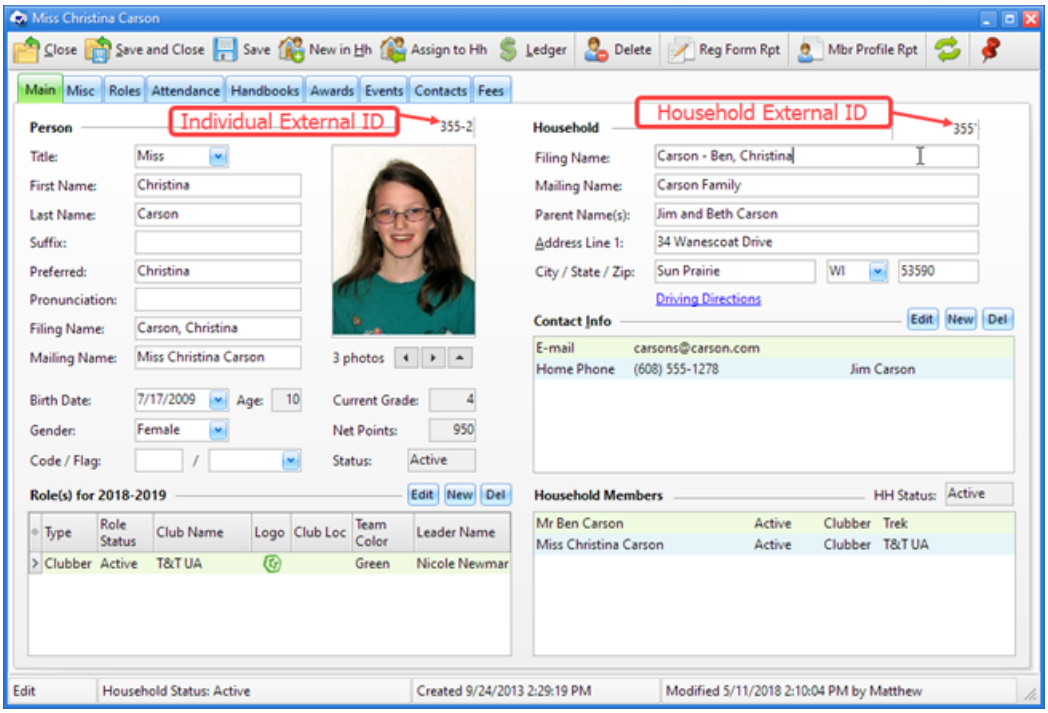
5.2.2 Main

The **Main** tab of the Member Window tracks basic Member, Household, and Contact information and provides a list of Household Members.



Member

- **(Optional) Member External ID** - ten character text field to reference an ID from an external source (such as other software used to track church members). To make it visible, under **Admin > Options > Members**, choose "**Show the external ID fields on the Member form**".

  The external IDs can be printed using the Household and Member ID List report. They can also be included on the Household List - Contact Information report. The individual external IDs can be shown on the main Clubbers and Leaders grids by making the column visible.

- **Title** - selection options are determined by **Admin > Generic Lookups** > **Titles**. Selecting a gender specific title automatically sets the **Gender** field.
- **First Name**, **Last Name**, **Suffix**, **Preferred -** self explanatory!
- **Pronunciation -** text box for a phonetic spelling of a difficult-to-pronounce name.
- **Mailing Name -** filled automatically as other name fields are completed, but can be edited. Choose to "**Use a member's Title when deriving the Mailing Name**" under **Admin > Options > Members**.
- **Photo** - displays the primary photo. Multiple photos can be kept for a member. Use the navigation buttons below the frame to view other photos or add a photo.

  Double click the frame to open the Photo Manager for more photo options.

- **Birth Date - Age** and **Current Grade** will be calculated and are read-only.

  The Grade can be changed in the Role if needed.

- **Gender** - set automatically if a gender specific title is used, but can be selected manually.
- **Net Points -** read-only field derived by calculating all of a members points for attendance, visitors, sections, etc. Spent points (entered through the Club Store) are deducted from the running total.
- **Code** - five character text field to discretely categorize or tag members. Any unique codes can be used, but it is important for leaders to know what they mean. For example:

  "M" to indicate there are medical issues

  "B" to represent all clubbers who come with the bus ministry

  "L" to represent someone in law enforcement (leaders obviously) that could be called on if there was a security concern

  In addition to being a column on the main Clubber grid, it is used on many Report dialogs to enhance selection criteria. It can optionally be printed on the Name Tags.

- **Flag -** 6 color options. This is a custom way to categorize or "flag" particular members. Like the **Code** field, this provides a discreet way to identify members. For example, a Red Flag could be used to identify clubbers from a broken home where there might be a security concern. A Blue Flag could be used to identify clubbers with a learning disability or behavioral problem. Members who need a new name tag printed, who owe money or are missing paperwork could be flagged. Note: unlike the Code field, this field is not used on report dialogs to enhance selection criteria. The Flag column can be made visible on the Clubber, Leader or Check-in grids.

  Set flags for multiple members at once using **Action** > **Set Flag** on the Clubber or Leader grids.

- **Status -** read-only. A person's status is determined automatically based on the status of the roles in the current club year. Statuses include: **Active**, **Archived**, **Graduated**, **Inactive**, **Prospect** or **Visitor**.

Role(s) for the Current Club Year

- This roles grid is read-only and provides summary information about the role(s) for the current member in the current club year. Use the Member's Roles tab to see all roles as well as additional information for each role.
- To change a role record, select the record and then click the **Edit** button or double-click a row in the grid. This opens the Roles dialog which allows changes to the role.
- To add a role, click the **New** button.
- To remove a role, select the record and then click the **Delete** button.

  When a role is deleted, all of the data associated to the role (attendance, team assignments, etc) are also deleted. Before deleting a role, first consider editing it.

  There is also a right-click popup menu available in the grid to Edit, Add or Delete roles.

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Household

- **(Optional) Household External ID** - ten character text field to reference an ID from an external source (such as other software used to track church members). To make it visible, under **Admin > Options > Members** choose "**Show the external ID fields on the Member form**".

  The external IDs can be printed using the Household and Member ID List report. They can also be included on the Household List - Contact Information report. The household external IDs can be shown on the main Households grid by making the column visible.

- **Filing Name, Mailing Name, Parent Name(s)** - filled automatically using the following defaults, but can be edited.

  - **Household Filing Name**: **Last Name** followed by a dash and a list of all **Preferred (First) Names**. Example: "Green - Sandy, Michael, Tina". In households that have persons with different last names, the last names are listed in alphabetical order, separated by "/". Example: for Rebecca Brown, Chad Smith and David Smith: "Brown/Smith - Rebecca, Chad, David".

    To re-derive the Household Filing Name, delete the current value and TAB out of the field.

  - **Mailing Name**: **Last Name** + "Family".
  - **Parent Name(s)**: Mr. and Mrs. + **Last Name**.

- **Address Line 1** - street address.
- **City, State, Zip** - defaults to the City, State and Zip of your church, but can be modified.

  To turn off this default, go to **Admin > Options > Members**. Uncheck the box next to "**Use the Church's City, State and Postal Code as the default values when creating new members**".

  Also under **Admin > Options > Members**, choose to "**Overwrite City and State values when the Postal code changes and a match is found in the lookup table**". If City, State, and Postal Code values are specified under **Admin > Generic Lookups** > **City, State, Zip**, the City and State fields can be skipped to type a zip code. The City and State values will then be filled in. To make this the default, choose "**When tabbing through the address fields, skip the City and State and go directly to the Postal Code field**".

- **Driving Directions** - opens a dialog with a text box to track directions. Click **Print Preview** for a formatted report that includes contact information. This can be useful for a bus ministry.

Contact Info

- The contact grid is read-only and provides summary information about the contact records for the household.
- To change a contact record, double click a row in the grid or select a row in the grid and then click the **Edit** button. This opens the **E-Contacts dialog** which allows changes to the contact records.
- To add a contact record, click the **New** button.
- To remove a contact record, select the record and then click the **Delete** button.

  There is also a right-click popup menu available in the grid to Open the E-Contacts dialog or Delete contact records.

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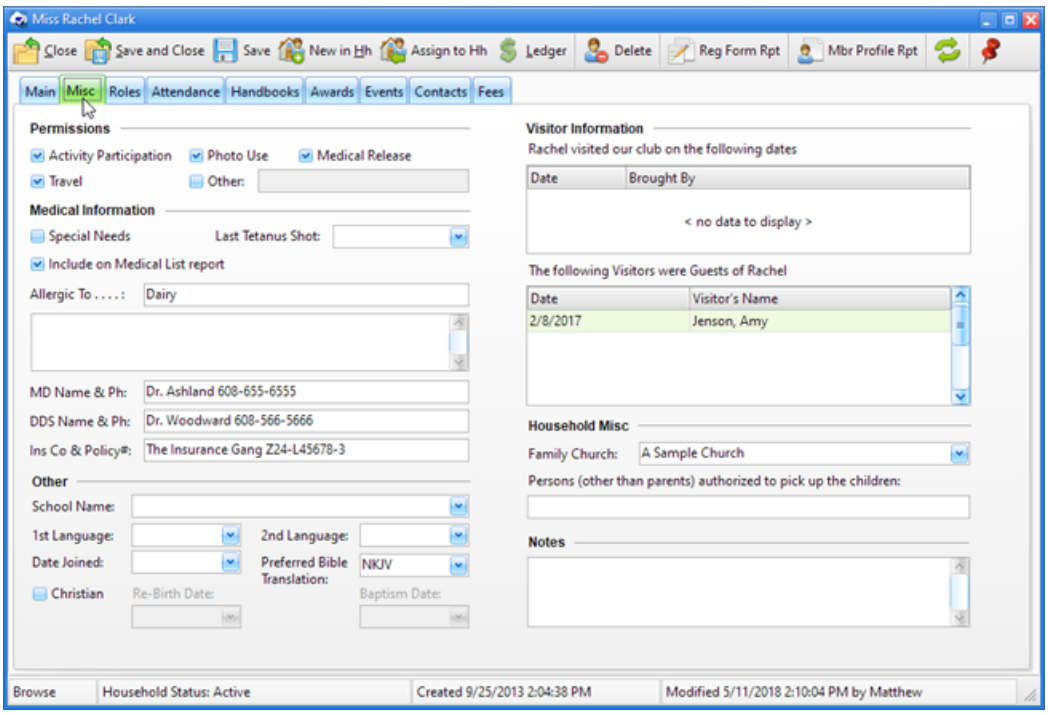
Household Members

- This grid lists any other members in the database associated to the household.
- To open another member's record, double click a name in the grid or use the right click pop-up menu.
- To add a new Household Member, use the **New in Hh** button in the toolbar.

5.2.3 Misc

The **Misc** tab of the Member Window tracks other useful information about the member, such as Permissions, Medical and Visitor information, Notes, and Other miscellaneous items.



Permissions

Indicate consent has been given to:

- participate in **Activities** (such as Game Time)
- **Travel**
- use a **Photo**
- **Release Medical** information
- **Other** - allows for an additional custom permission related item. When checked, a description can be entered.

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Medical Information

- **Special Needs** - additional details can be entered in the memo field under the medical information section.
- **Last Tetanus Shot** - tracks the date.
- **Include on Medical List report** - will list medical information along with contact information for the member when generating the formal report.
- **Allergic To** - text field. Any additional information related to allergies or other medical information can be entered in the memo field directly below the listed allergy.
- **Doctor**, **Dentist** and **Insurance** - text fields for doctor and dentist contact information as well as insurance company and policy number.

Combo boxes are populated with known data to make it easy to select existing values when adding additional members to a household.

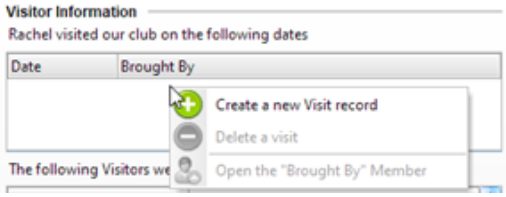
If the doctor, dentist or insurance info is updated for a member of the household, there will be an option to update the same information for all members of the household.

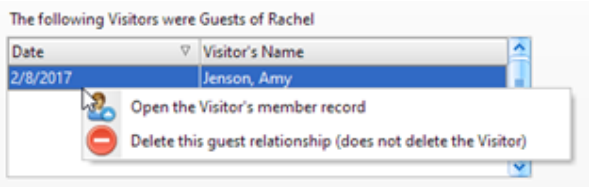
Other

- **School Name -** selection options are determined by **Admin > Generic Lookups** > **School Names**. Select <new> to add a new generic lookup value without switching to the Admin Module.
- **1st Language**, **2nd Language -** selection options are determined by **Admin > Generic Lookups** > **Languages**.
- **Date Joined -** tracks when a clubber first **joined**. A member's **Status** can change from time to time, and the **Registration Date** changes for each club year; but this field doesn't change, so it allows tracking how long a member has been involved in the club.
- **Preferred Bible Translation - ESV, KJV**, **NIV**, **NKJV**, **Spanish**; used to filter the selection list when assigning a handbook to the member.
- **Christian** - when checked, the **Re-Birth Date** and **Baptism Date** fields are enabled.

Visitor Information

This section has two grids: one for when this member **visited** and one for when this member **brought visitors**. To record data, right click in a grid and select from the pop-up menu.





These grids are intended for viewing visitor/visiting history or editing existing data. A more direct method of creating visitor records is to click the **Add Visitor** button in the Check-in Module.

Household Misc

- **Family Church** - selection options are determined by **Admin > Generic Lookups** > **Church Names**. It defaults to your church. Selecting <new> invokes a dialog to add a new Generic Lookup value.

  Select to not "**Use our Church Name as the default Church Name value when creating new members**" under **Admin > Options > Members**.

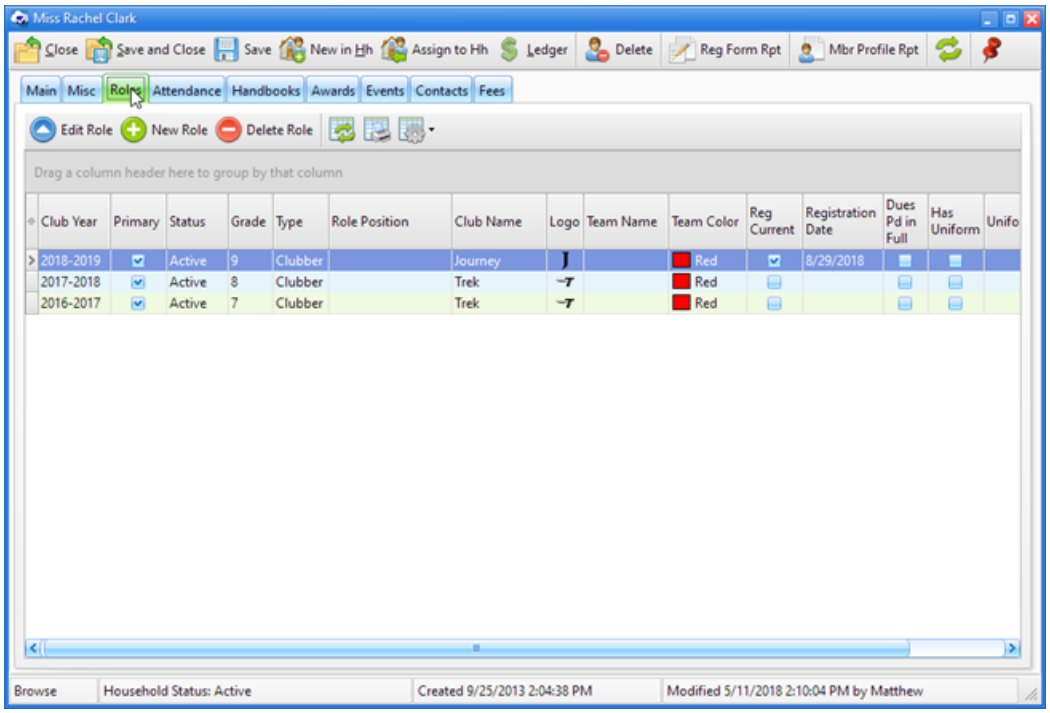
- **Persons authorized to pick up the children** - name(s) of person(s) authorized to pick up the clubber(s) from Awana. This field is only visible if the Role Type is Clubber.

Notes

This section provides a memo field to track any additional information for the member.

5.2.4 Roles

The **Roles** tab provides an overview of all of a member's roles. It includes the **Type** of role (clubber or leader) as well as the **Club Name**. For leaders, it includes a **Role position** (such as game director or listener). **Team** information (**Color** and **Name**) are stored in the role as well as **Grade** and **Leader** assignment (for clubbers). **Registration** and **Uniform** information can also be tracked for each role.



As with most grids in the Windows App, this grid is customizable.

Toolbar

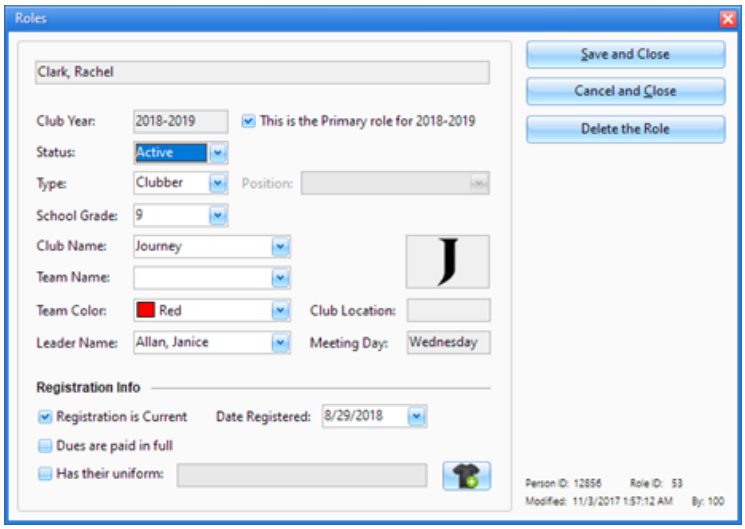
Besides the Member Window toolbar, there is another toolbar that is specific to the **Roles** page.

Icon	Action	Description
	Edit Role	Opens the selected role in the Roles dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the role record.)
	New Role	Opens the Roles dialog with blank/default values to create a new role.
	Delete Role	Removes the selected role.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

5.2.4.1 The Roles Dialog

Opening or creating a role record opens the Roles dialog to view, modify, or enter details of a member's role.

When changing information for a role, Attendance (session) records are also updated. In order to preserve historical data, changes will only be applied to the Attendance records for the Current Club date and future dates. This applies to **Status, Club Name, Team Name, Team Color**, and **Leader Name**. As an example, to change a member from the Red Team to the Blue Team on week 13, update the Team Color shown on the role record. The Attendance records for weeks 1-12 will keep the team color as red. Attendance records for week 13 and all additional weeks will have the team color changed to blue.



- **Club Year** - shows the current club year.
- **Primary** - when there are two roles in the same club year, this indicates which one is primary.
- **Status - Active**, **Archived**, **Inactive**, **Prospect** or **Visitor**. Setting a member's status is useful when filtering grids to show only selected members.

- **Type - Clubber** or **Leader**. If the type is Leader, the **Position** field will be enabled to select the specific position the leader serves in. The selection options are determined by **Admin > Generic Lookups > Roles**.

  A person can only have one Clubber role. If a second role is added, the type will default to Leader with a position of Student Leader.

- **School Grade** - calculated based on age, but can be selected manually or changed.
- **Club Name** - automatically assigned based on grade and gender, but can be selected manually. Selection options are determined by **Admin > Club Setup** > **Club Names, Logos, Dues and Points**.
- **Team Name** - selection options are determined by **Admin > Club Setup > Team Names**.
- **Team Color** - twelve colors are provided (or select None to indicate no team color).
- **Leader Name** (clubbers only) - selection options are based on active leaders. Selection list shows the leader's Club Name to facilitate leader assignments.

Registration Info

- **Registration is current** - when checked, the date field is enabled. (It defaults to the current club date, but can be changed.)

  When the member record is saved after setting the registration to current, the database ensures that the member's status is "Active" and that a fee record exists for annual dues, if applicable.

  The **Registration is current** check box is marked automatically when using the Register and Post Payment dialog or the Registration Window dialog. To choose which permission related check boxes are set automatically when the registration is set to current, go to **Admin > Options > Registration Form and Reports** > **Permission Defaults**.

- **Dues are paid in full** - indicates all of the dues have been paid for the year.

  This is designed for use by clubs that do not track specific payment information, but want to know who has paid the dues. It can be shown on the main Clubbers grid. It is NOT connected to the Ledger, so posting a payment for the full dues amount will not check this box.

  If this box is checked, all of the Dues Pd checkboxes in the (weekly) Attendance records will also be checked.

- **Has uniform** - if the uniform has not been earned yet, the description field can still be used to track the size for future use. Using the **Assign Uniform** button opens the Assign Uniform dialog to assist in creating a uniform fee. It will also set the Has Uniform fields.

  Updating a uniform fee's description also updates the **Has Uniform** text field. Also, deleting the fee clears the **Has Uniform** check box and text field.

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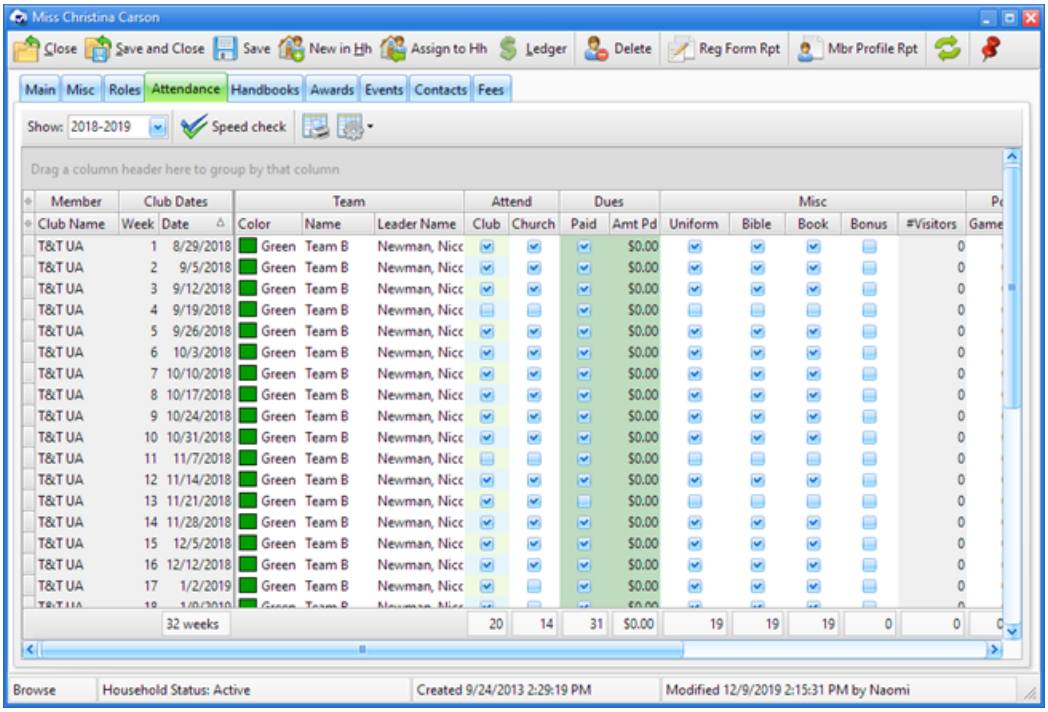
5.2.5 Attendance

The **Attendance** tab provides an overview of the member's club attendance (as well as other attendance related items), handbook sections completed, and points for each week. The attendance and other categories are usually entered through the Check-in grid during club time, but can also be entered or edited here. For easier data entry, maximize the window.



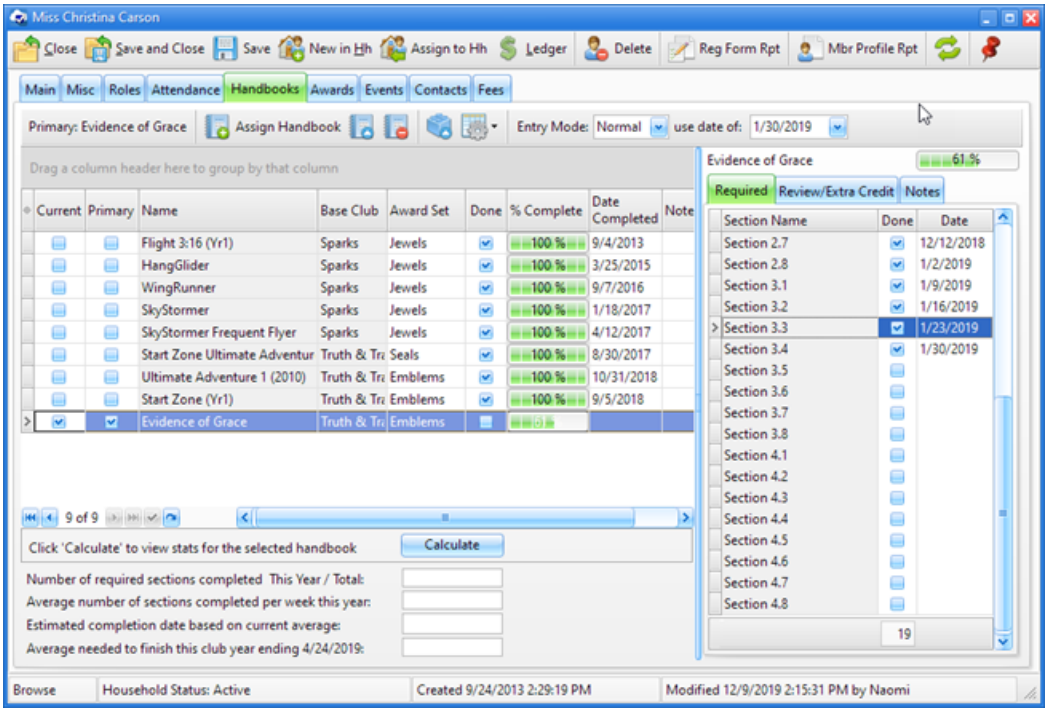
As with most grids in the Windows App, this grid is customizable.

When a check box is marked, the **Total Points** field for the selected week is adjusted according to the points assigned under **Admin > Club Setup** > **Clubs, Logos, Dues and Points**.

This grid provides a big picture view of a clubber's entire club year. It shows the complete history of attendance and all other categories including sections completed and points spent. There are totals for most columns in the grid footer. Use the **Preview/Print** button to get a hard copy.

5.2.6 Handbooks

The **Handbooks** tab provides an overview of all of the handbooks assigned to a member. Marking completed sections is usually done from the Check-in grid; however, this page is useful to enter historical information such as handbooks completed in a prior club year or sections completed on a prior club date.



Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Handbooks** page.

Icon	Action	Description
	Assign Handbook	Opens the Assign Handbook dialog to assign a new handbook to the selected member.
	Open Handbook	Opens the generic handbook window for the selected handbook to show details about the book and the award triggers.
	Delete Handbook	Removes the selected handbook from this member's records.
	Open Inventory Item	Opens the selected handbook's related inventory item in the Inventory Item Window.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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- **Entry Mode -** controls what happens as sections are marked.
  - **Normal** - points are tallied as sections are marked. If an award is earned upon completion of a section, it is automatically created.
  - **History** - no point calculations and only book level awards are generated. Completed sections must be marked one at a time. Use this when entering historical data for a small number of sections done prior to the current club year.
  - **Speed** - no point calculations and only book level awards are generated. Sections do not need to be marked one at a time. Instead, simply mark the last completed section and ALL of the prior sections are marked automatically. Use this when entering historical data for a large number of sections completed prior to the current club year when actual completion dates are not significant.
- **use date of** - the date used when a section is marked. It defaults to the current club date, but can be modified when marking sections from a different date.

Handbooks Grid

All handbooks that have been assigned to the clubber are shown along with the following information:

- **Current** - indicates the clubber is actively working in the handbook. There can be more than one current book (for example, a clubber might still be working on Review or Extra Credit work in another book, or completing an unfinished book from a previous club.) All current books are available as a choice in the Check-in Module's Sections Grid for marking sections.
- **Primary** - indicates the clubber's main handbook. This book is displayed in the Primary Book column of the Clubbers and Check-in grids.
- **Name -** of the handbook.
- **Award Set** - available award sets for books where more than one type of award can be earned. This determines the type of award to trigger (for example, to use up an inventory of old awards instead of a new set to be associated with the book).
- **Done** - indicates a book is completed.

  A handbook is normally marked as **Done** automatically when the last required section is completed. Manually select this check box only when entering historical data. Doing so requires a confirmation to continue and asks for a **Completion Date** which is used for all blank required sections of the book. An option to assign the next handbook is also given. Answering "yes" invokes the Assign Handbook dialog.

  When entering historical data for BOOKS that were completed PRIOR to the current club year, do NOT tediously mark all of the sections completed. Instead, use the **Done** check box to indicate the book was completed. If the actual Completion Date is known, enter it. If not, enter a date that is PRIOR to the current club year. Otherwise, the clubber will get credit for completing the book in the current club year. If the exact date of completion is not known, a good rule of thumb is to select the last date of the prior club year.

- **% Complete -** shows the percent of required sections completed in the handbook.
- **Date** - of completion. This defaults to the current club date when the **Done** check box is marked, but can be modified. For the clubber to get credit for completing the book during the current club year, select a valid club date in the current club year. (See Tip under "Sections Grid" below.)

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- **Calculate** button **-** fills in the statistic fields below the grid for the selected handbook. This is especially useful near the end of the club year to estimate if the clubber will be able to complete a handbook before the end of the year.

To view this information for multiple clubbers, use the formal report "Current Handbook Status" and select the Type of "Summary". This will help in planning an end of year award supply order.

Sections Grid

The right side of the Handbook page contains a **Sections Grid** which displays the sections applicable to the selected handbook. The Sections Completed Grid of the Check-in module is generally used to enter sections completed during club time, but completed sections can also be entered here.

- **Handbook / Percent Complete** - displays information about the handbook currently selected in the main grid
- **Required,** and **Review/Extra Credit** tabs **-** Sections in the **required** group must be completed to get a book award. Sections in the **review** or **extra credit** group are optional. Click on the desired tab to show the relevant **Sections Grid:**
  - **Section Name -** description matching the section in the handbook.
  - **Points -** amount added to the member's total when the section is completed.
  - **Done** - indicates a section has been completed.
  - **Date** - of completion for the section. This defaults to the **use date of:** selection in the toolbar, but can be modified.
- **Notes** tab - tracks any additional details pertaining to the specific handbook for this member.

When entering historical data for SECTIONS (in an incomplete book) that were completed PRIOR to the current club year, be sure each **Completion Date** is PRIOR to the current club year. Otherwise, the clubber will get credit for the completed sections in the current club year. If the exact date of completion is not known, a good rule of thumb is to select the last date of the prior club year.

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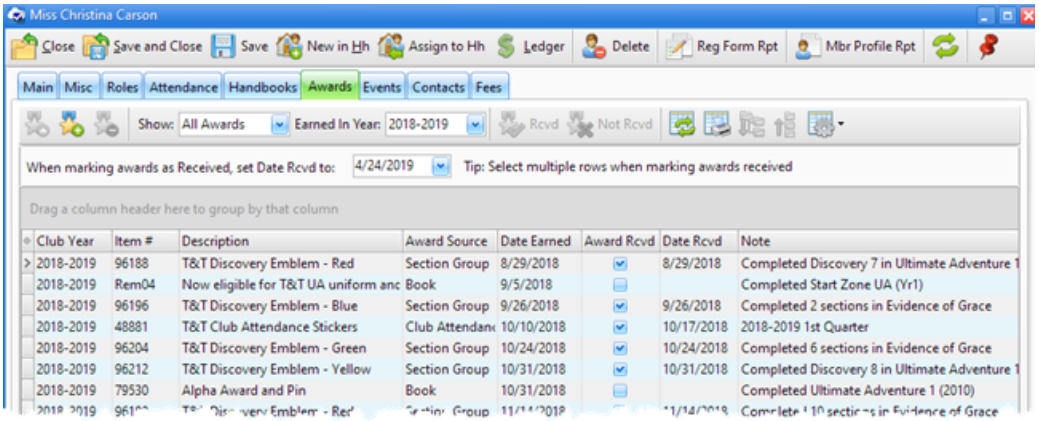
5.2.7 Awards

The **Awards** tab provides an overview of a clubber's awards. It is helpful for reviewing and managing the awards for the specific member. See the Awards Module for additional information.



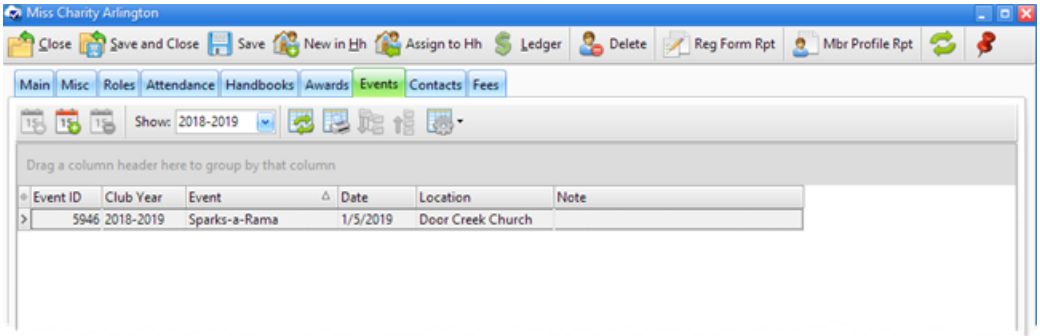
Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Awards** page.

Icon	Action	Description
	Open Award	Opens the selected award in the Award dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the award.)
	New Award	Opens the Award dialog with blank/default values to create a new award.
	Delete Award	Removes the selected award.
	Show	Filters the data in the grid. Choose to show **All Awards**, **Not Received** or **Received** awards. **Earned in Year** limits records to awards earned in the selected club year.
	Rcvd	Marks the selected award(s) as having been received by the member. **When marking awards Received**, set **Date Rcvd to:** defaults to the current club date. When working with awards received on a different date, change the date before clicking the **Rcvd** button.
	Not Rcvd	Marks the selected award(s) as *not* being received by the member yet.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

5.2.8 Events

The **Events** tab provides an overview of events the clubber has attended. See the Events Module for additional information.



Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Events** page.

Icon	Action	Description
	Open Event	Opens the selected event in the Event dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the event.)
	New Event	Opens the Event dialog with blank/default values to create a new event.
	Delete Event	Removes the selected event.
	Show	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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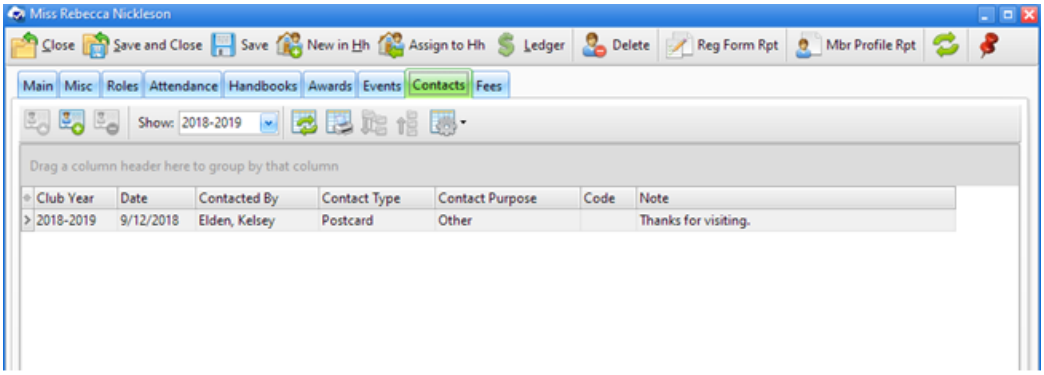
5.2.9 Contacts

The **Contacts** tab provides an overview of leader contacts with the clubber outside of club sessions. See the Contacts Module for additional information.



Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Contacts** page.

Icon	Action	Description
	Open Contact	Opens the selected contact in the Contact dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the contact.)
	New Contact	Opens the Contact dialog with blank/default values to create a new contact.
	Delete Contact	Removes the selected contact.
	Show	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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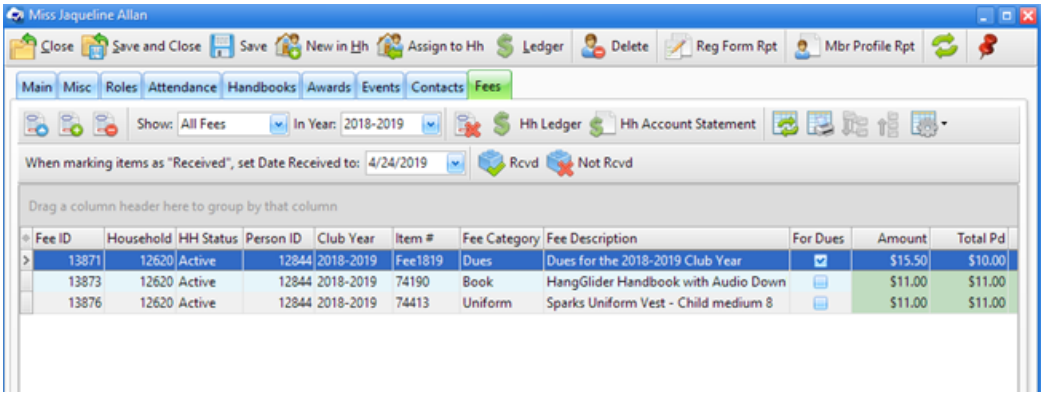
5.2.10 Fees

The **Fees** tab provides an overview of a member's fees. See the Ledger Module for additional information.



Toolbar

Besides the Member Window toolbar, there is another toolbar that is specific to the **Fees** page.

Icon	Action	Description
	Open Fee	Opens the selected fee in the Fee dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the fee.)
	New Fee	Opens the Fee dialog with blank/default values to create a new fee for this member.
	Delete Fee	Removes the selected fee. This process requires a confirmation.
	Show	Filters the data in the grid. Choose to show **All Fees**, **Paid Fees**, or **Unpaid Fees**. **In Year:** limits records to fees in the selected club year.
	Waive Fee(s)	Waives any balance on the selected Fee(s). This creates a payment record of type "Waived" and lists your club name as the Payor.
	Open Household Ledger	Opens the Household Ledger for the selected member's family to manage fees and payments.
	Hh Acct. Statement	Opens the Household Account Statement report dialog. The selection criteria defaults to the member's household.
	Rcvd	Marks the selected fee item(s) as having been received by the member. **Set Date Received to:** defaults to the current club date. For items received on a different date, change the date before clicking the **Rcvd** button.

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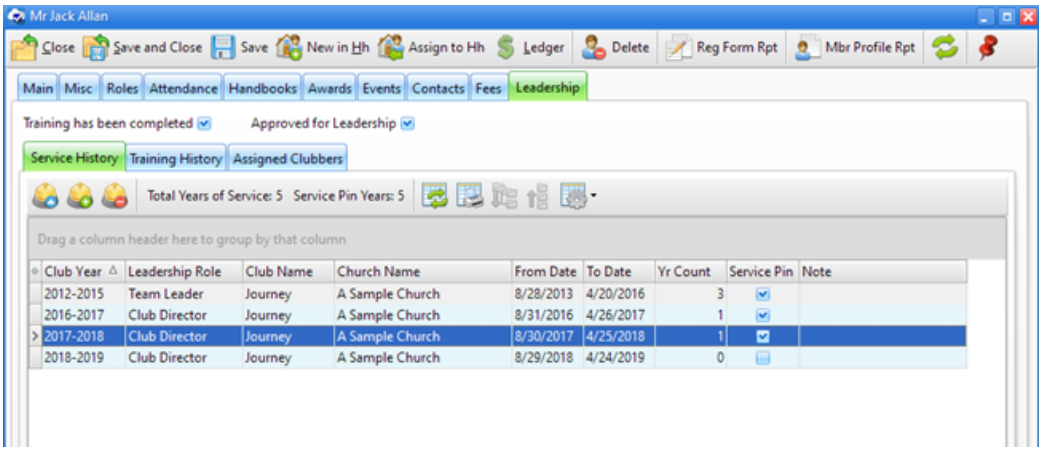
	Not Rcvd	Marks the selected fee item(s) as *not* having been received by the member yet.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

5.2.11 Leadership

This tab is only visible if there is a role with a **Type** of **Leader**. It tracks the details of a leader's service and training, as well as listing clubbers assigned to the leader.



At the top are check boxes to indicate: the **Training has been completed** and the leader has been **Approved for Leadership.**

Service History

Service History records are created automatically as leader records are created and roles are assigned.

Icon	Action	Description
	Open Service Record	Opens the selected service record in the Service dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the service record.)
	New Service Record	Opens the Service dialog with blank/default values to create a new service record.
	Delete Service Record	Removes the selected service record.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

Credit for service (for year counts) are triggered based on the attendance requirement set under **Admin > Awards > Leadership Service Awards**.

Training History

The Windows App can automatically create user-defined Training records when adding a new leader based on settings under **Admin > Generic Lookups** > **Leadership Training**.

Icon	Action	Description
	Open Training Record	Opens the selected training record in the Training dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the training record.)
	New Training Record	Opens the Training dialog with blank/default values to create a new training record.
	Delete Training Record	Removes the selected training record.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

Assigned Clubbers

If clubbers have been assigned to a leader, either from the Clubbers Module Action menu or the Member's Role record, all of the assigned clubbers are listed in this grid.

5.3 Working with Inventory

The Inventory module contains all of the items in the Awana Ministry Supply Catalog. It helps track the quantity of items in stock. The Order form makes it easy to build and track supply orders. When a shipment is received, marking the items as received in the Order form replenishes the Inventory Quantities in Stock. Below is an example with links to related topics. See additional information in the Inventory Module.

Example Scenario

When an award is triggered, the award item's Quantity in Stock is reduced. When a new handbook or uniform is assigned, the quantity in stock can be reduced if the option is selected on the dialog.

To view items that need to be ordered, on the Inventory grid, select to **Show:** Items we use and need to order. This will show any items that have a Qty in Stock less than the Re-Order level that is set. Select all the desired rows and choose to 'Add the selected items to an Order' from the Action dropdown or the right click popup menu.

Open and review the Order under **Inventory > Orders**. Add additional items and adjust the quantities if needed. Place the order, using one the following:

a) print the Order form and mail it or fax it to Awana headquarters

b) print the Order form to a PDF file, then e-mail it to Awana headquarters

c) print the Order form and use it as a worksheet to enter the items through Awana's Online Store

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Then, change the Order Status to Submitted so it can no longer be modified.

When the supply order arrives, reopen the Order and set the status to Received. This causes check boxes to appear in the Line Items grid. Mark each item as received as the shipment is verified. Marking items as received increases the item's Quantity in Stock by the appropriate amount. After all items are marked as received, the Awana Order Number and Invoice fields are updated, and all work on the Order is complete, change the Status to Closed.

5.3.1 Initial Inventory Setup

For Inventory Tracking to work correctly, the database inventory needs to match your current inventory and be set up with your preferences.

In the Inventory Module**,** select the **Items** tab, then:

1. Limit the number of items in the grid by indicating which items you use as follows:
   - Select **Show: Items we use**. For items you DON'T use, select the record(s) and choose **Mark the selected record(s) as Not In Use** from the **Action** menu or the right click pop-up menu.
   - Select **Show: Items we don't use.** For items you DO use, select the record(s) and choose **Mark the selected record(s) as In Use**.

   To speed up the process, manipulate the records in the grid in ways that limit the records, then select multiple records at once before marking as in use or not in use.

   We recommend that you do NOT delete inventory items. Simply set them to 'not in use' so they do not initially show in the grid.

2. Add additional items to the inventory that you use that are not in the Awana Catalog.
3. Modify the **Sell Prices**. This is the price you charge for items. It may differ from the Awana Catalog price (for example, rounding up to cover shipping costs). The Sell Price is used when creating a fee.
4. Enter how many of each item you have on hand in the **Quantity in Stock** field.
5. Enter the **Quantity in Stock** threshold and **Order Qty of** details for determining items that need to be ordered.
6. Set the Inventory Tracking preferences.

With all of this set correctly, as awards and fees are created and orders are received, the inventory quantities are adjusted automatically and accurately!

5.3.2 Inventory Tracking

The Inventory Tracking preferences determine how the inventory quantities are managed.

1. Under **Admin > Options > Inventory and Ordering**, all of the following preferences are set and can't be edited:

   a. Automatically reduce the Inventory count of related items when a new Award or a Fee is created

   Awards are triggered automatically. With this set, the **Quantity in Stock** will be adjusted.

   b. Automatically increase the Inventory "**Quantity in Stock**" when orders are marked as "**Received**" and the line items are checked in

c. Automatically add line items to an open supply order when the Inventory Item's **Order Level Quantity** is reached

This feature is not currently available in the Windows App, but is listed as an enhancement that will be added.

d. When adding new Line Items to an Order, display the **Expense Category** column and populate it with the default value as set in the related Inventory record

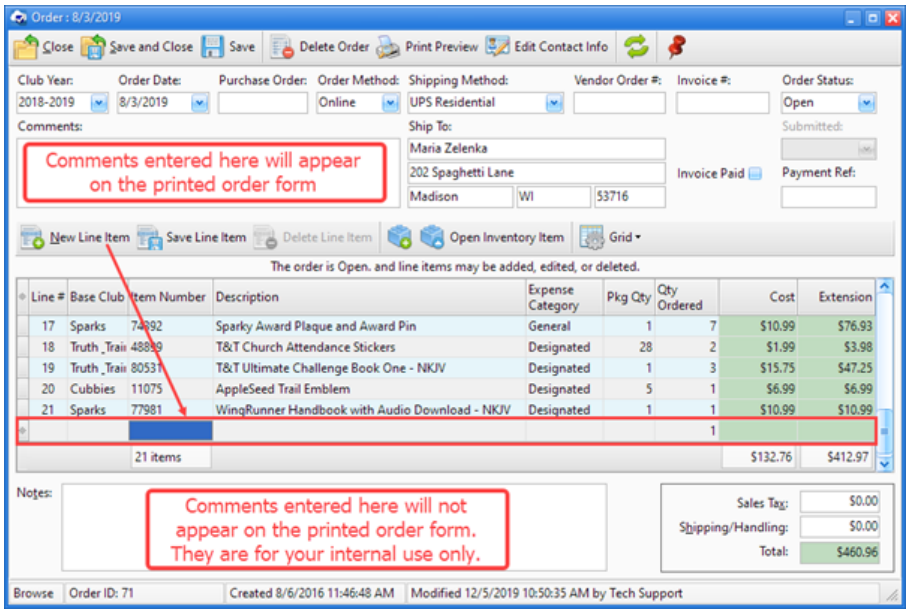
2. Under **Admin > Options > Misc**, choose default values to use to **Reduce the Inventory Qty in Stock** when a handbook or uniform is assigned.

In addition to reducing the Qty in Stock, choose default settings to automatically **Create a Fee** for each book or uniform assigned (if the Inventory Sell Price is more than one cent), and to **Mark each book or uniform as having been received**.

5.3.3 Placing an Order

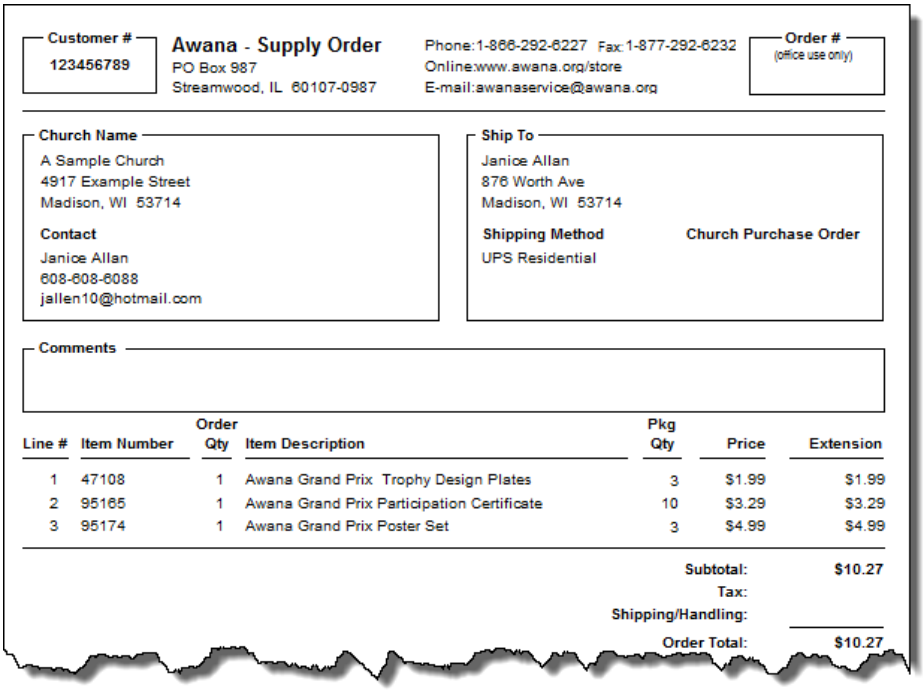
To create an order, click the **New Order** button above the Orders grid in the Inventory Module. Here is an overview of the process:

1. **Open** - the default **Status** when an order is created. Each item to be ordered should have a line item entry in the grid in the lower section. To add items to the order:
   - Click the **New Line Item** button above the grid. A new row will be displayed.
   - Either select from the drop-down menu or type an **Item Number** or **Description**.
   - Update the **Qty Ordered** if needed. **Line #**, **Pkg Qty**, **Cost**, and **Extension** are filled automatically.



2. **Submitted** - use when the order has been placed as desired with Awana (via internet, phone, e-mail, etc.).

Here is an example of a printed Order form:



Customer # 123456789

Awana - Supply Order
PO Box 987
Streamwood, IL 60107-0987

Phone:1-866-292-6227 Fax:1-877-292-6232
Online:www.awana.org/store
E-mail:awanaservice@awana.org

Order # (office use only)

Church Name
A Sample Church
4917 Example Street
Madison, WI 53714

Contact
Janice Allan
608-608-6088
jallen10@hotmail.com

Ship To
Janice Allan
876 Worth Ave
Madison, WI 53714

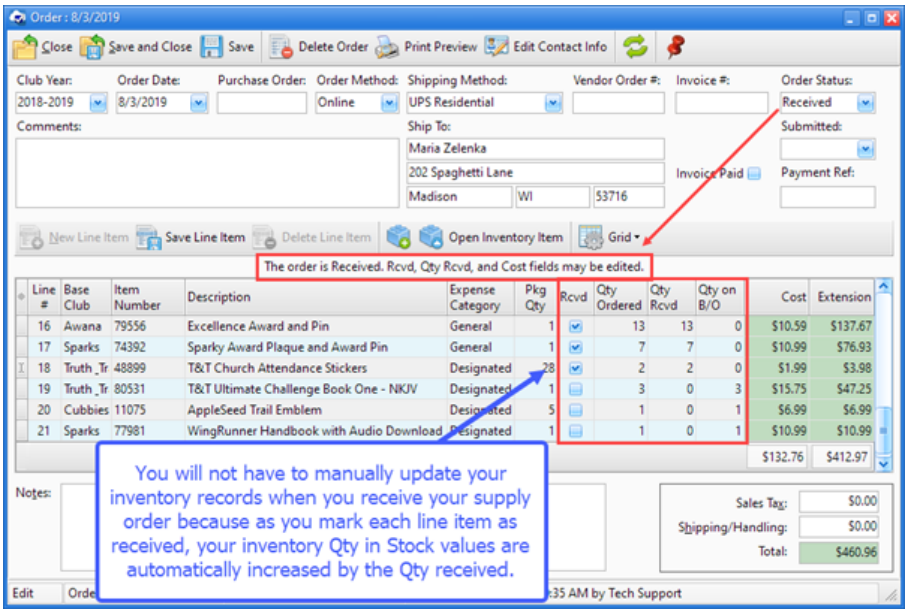
Shipping Method UPS Residential
Church Purchase Order

Comments

Line #	Item Number	Order Qty	Item Description	Pkg Qty	Price	Extension
1	47108	1	Awana Grand Prix Trophy Design Plates	3	$1.99	$1.99
2	95165	1	Awana Grand Prix Participation Certificate	10	$3.29	$3.29
3	95174	1	Awana Grand Prix Poster Set	3	$4.99	$4.99

Subtotal: $10.27
Tax:
Shipping/Handling:
Order Total: $10.27

3. **Received** - use when the order arrives. The **Rcvd**, **Qty Rcvd** and **Qty B/O** columns show in the grid. As the **Rcvd** box is marked, the **Qty Rcvd** defaults to the total Qty Ordered and Qty B/O defaults to zero. Update these values as needed to reflect the correct quantities received.



4. **Closed** - use after the **invoice paid** check box is marked and the corresponding **Paid Invoice #** is entered.

5.4 Working with the Ledger

The Ledger Module shows the big picture of the financial records. Use the flexibility of its Fees and Payments grids to filter or group the records to view relevant data and totals.

To view financial records for a single household, use the Household Ledger. To view financial records for a single member, use the Member Window's Fees tab.

The main types of records in the ledger are fees and payments. Having accurate records of purchases and payments helps instill confidence in parents that the program is run well. This section explains the basics of maintaining these records and points to other sections for more details.

Fees

Besides fees for dues, a fee should be created whenever a member receives an item for which payment is expected. Fees for dues, handbooks, and uniforms can be automatically created. Fees for items such as bags and replacement books or awards need to be created manually. Fees for awards are generally not necessary since they are given to clubbers free of charge, but if a clubber repeatedly loses his award badges, a Fee record can be created. Fees can be created or opened from the Ledger Module or the Household Ledger.

A fee can be created for any item in the Inventory Module. The fee amount is determined by the item's **Sell Price**. If the item is not in the Fee Dialog's item list, open the item and click the Club Usage tab. Ensure the item is marked as 'in use' and that it should be displayed as a **choice in any Fee list**.

Payments

As members pay for dues or purchased items, post the payments and apply the payments to applicable fees. If an over-payment occurs, part of the payment is "unapplied" as a credit on the account. When another Fee record is created, "apply" the unapplied payment amount to the new Fee.

During registration it can be common to receive payments but not have fee records yet. Post the payment in the Household Ledger. It is tracked as an "Unapplied" payment that can be applied later.

Payments can be *viewed* in the Ledger Module or Household Ledger, but the Household Ledger must be used to *create/post* payments.

Waiving a Fee

Most Awana programs allow kids to attend who are unable to pay for dues, books, or uniforms. Even if a fee is expected to be unpaid, create the fee record anyway so the inventory is maintained as well as accounting for where items were used. Zero-out the household balance by waiving the fee. This helps track expenses the club has to cover and determine how much money is needed for the Scholarship Fund. Totals can be viewed in the **Ledger > Fees** and **Ledger > Payments** grid footers.

When a balance is waived, a payment record is created of **Type** "Waived" with your club name as the **Payor**. From the Ledger tab's Fees grid, waive a fee by selecting one or more records. Use the **Waive** button in the toolbar or right click and select **Waive** from the pop-up menu. Confirm by clicking **Yes**.

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From the Household Ledger, there are two different ways to waive a fee balance:

1. Select "**Waived**" as the **Payment Type**. Check boxes appear in the first column of the Fees grid to select which fee records to waive. As Fees are selected, the **Total** amount of the waived payment is calculated. When finished, click **Post the Payment.**
2. Select the fee record to be waived. Use the **Waive Fee** button above the grid, or right click and select **Waive Fee** from the pop-up menu. Confirm by clicking **Yes**.

Example Scenario

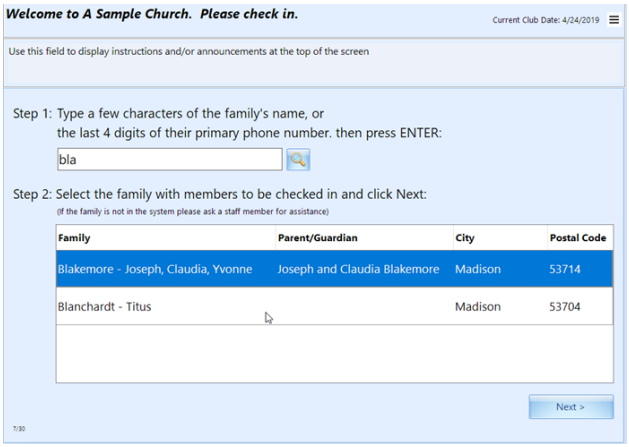
A child receives a new book and the parent says, "If you tell me how much I owe, I'll bring the money next week." You reply, "A book costs $15.00, but let me check your balance." You are in the Check-in Module so you type a few characters of the last name in the **Search** field and press **Enter**. This hides all other records except that family. You click on the Household Ledger button in the toolbar. The **Household Balance** shows $11.00. You explain there was extra money received from a uniform payment. (The unapplied payment of $4.00 was then applied to the book fee.) Using the button in the toolbar, you print a Household Account Statement as a reminder.

The parent is surprised and impressed that you keep such accurate records and decides to pay $15. The next week the clubber brings the money with the Account Statement which has a note to donate the extra money to the scholarship fund. In the household ledger, you post a payment for $15.00, applying it to the book fee. This results in a $4.00 unapplied payment. Since you know this is a donation, you click the Fees tab and click **New Fee** to open the Fee dialog. You type "donation" as the Item Number and press **Enter**. Then you enter $4.00 as the **Amount** and click **Save and Close**. Under the Unapplied Payment tab you select the record and click **Use the Payment Amount** then click **Post the Payment**. This results in the $4.00 payment being applied to the $4.00 "Donation" Fee leaving a zero household balance.

5.5 Using the Windows App in Kiosk mode

The Windows App can be set up to handle basic check-in of members at a kiosk. Kiosk mode opens a simplified check-in dialog in full-screen mode. There are three simple steps to checking in members:

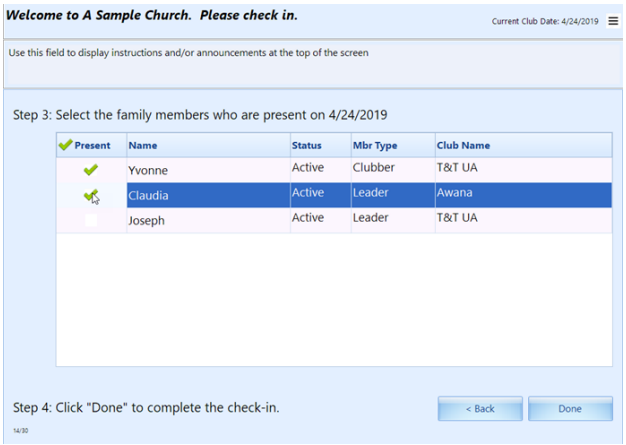
Step 1: **Search for the family:** type a few characters of a family name or the last 4 digits of the primary phone number, then press **Enter** or click **Search**. Matching family records are displayed for selection.



Step 2: Select a family: click a row to select the family with members to check-in; click **Next**.

If only one family meets the criteria, the database will use that family's information and go to Step 3.

Step 3: Select the family members who are present on the Current Club Date. Click **Back** to return to the previous screen if needed. Click **Done** when finished.

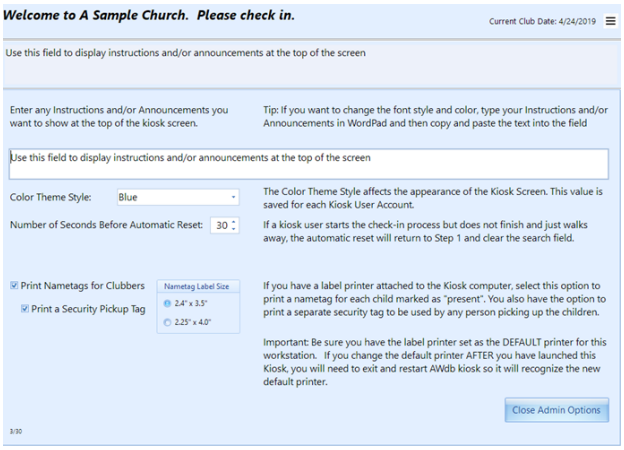


Setting up Kiosk mode

In order for kiosk mode to be launched, there must be a User record with an **Account Type** of "Kiosk". The user record can be for a person authorized to set up the kiosk, or for a specific computer used as the kiosk. (For example, user name "Lobby" or "Lobby 1").

When logging in with an account type of "kiosk", the kiosk dialog opens full-screen. Once logged in, preferences can be set by using the menu button in the upper right corner and selecting **Admin Options** from the drop-down.

To access admin options, the name and password of either an Admin or Kiosk user must be provided.



The following items can be customized:

Instructions/Announcements - the text that will be displayed at the top of the kiosk screen.

Color Theme Style - this value is saved for each Kiosk User account.

Number of seconds before automatic reset - after the set number of seconds of inactivity, the screen is reset to Step 1, clearing any other data from the screen.

Print Nametags for Clubbers - check the box to enable printing, then select a **Nametag Label Size** in the box. A separate label will print for each clubber and will include **First** and **Last** name, **Club Name**, **club location**, and primary phone number (including the contact person's name) along with a security pickup code and a current date and time stamp.

Print a Security Pickup Tag - if clubber nametags are printed, a parent pickup label can optionally be printed as well. The parent label lists all clubbers in attendance along with the security pickup code.

Be sure the label printer is set as the DEFAULT printer for the workstation. If the default printer is changed after launching the Kiosk mode, exit and log in again in order for the Windows App to recognize the new default printer.

Exiting Kiosk mode

Exit kiosk mode by using the menu button in the top right corner and selecting one of the following:

Exit Kiosk mode and Switch Users - exits kiosk mode and launches the log-in dialog to allow log in as a non-kiosk user

Exit the application - closes the kiosk dialog and shuts down the database

To prevent the database from being shut down by an unauthorized person while in kiosk mode, a user name and password must be provided from an Admin or a Kiosk user to exit.

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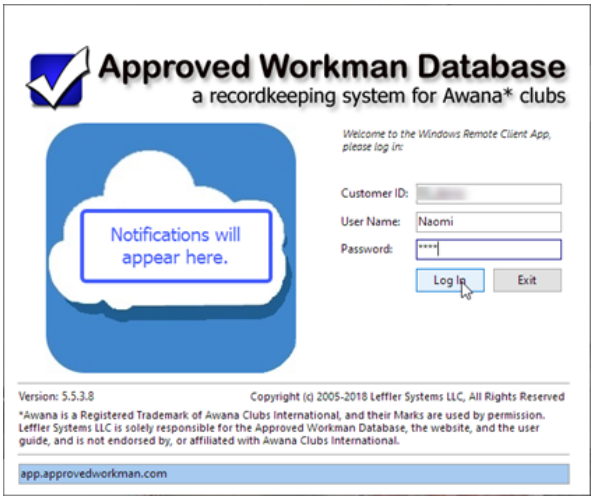
Chapter 6

6 The Log-in Dialog

The Log-in dialog checks credentials before allowing access to the database. Each person that is allowed to access the database should have a separate user account.

Do not create generic accounts with generic passwords that everyone knows! Multiple user accounts can be created under Admin > Users. Subscriptions are based on number of users logged in at once. There may be more user accounts than the subscription tier limit.

This section explains details of the Log-in dialog. For an overview, see Logging in to the Windows App.



- **Customer ID -** assigned customer number for your database
- **User Name / Password** - credentials that allow access for a user. An admin user can add users and assign passwords.

  Having unique user accounts allows each person to have customize grid layouts and select a theme/ skin. When records are added or modified, the timestamp and user ID will be more accurate. Also, some users should be 'regular' non-admin users, while others should have full Administrator access.

- **Log In** - verifies the **Customer ID, User Name** and **Password** are valid. If a user is already logged in to the database and attempts to log in again, a warning message appears asking to reset the account (thus closing the program that is already running).

  If the maximum number of users (based on subscription tier) are already logged in, a message will be displayed. If the database thinks YOU are already logged in, a different message will be displayed and provide an option to reset the account. Only use this option if you are certain no one else is using your account. In that case it is OK to reset your account, otherwise click **No** and exit the Log-in dialog.

  Note: If the database was not able to shut down and log a user out properly (for example, there was an error message that forced a shutdown), this message will appear. In this case, reset the account and continue with the log in.

- **Exit** - closes the Windows App application without attempting to log in.
- **Version Number** - updates are periodically released to fix defects and add features. When an update is applied, a newer version number will be displayed.
- **Notifications** - messages regarding updates or maintenance will be displayed in the cloud.

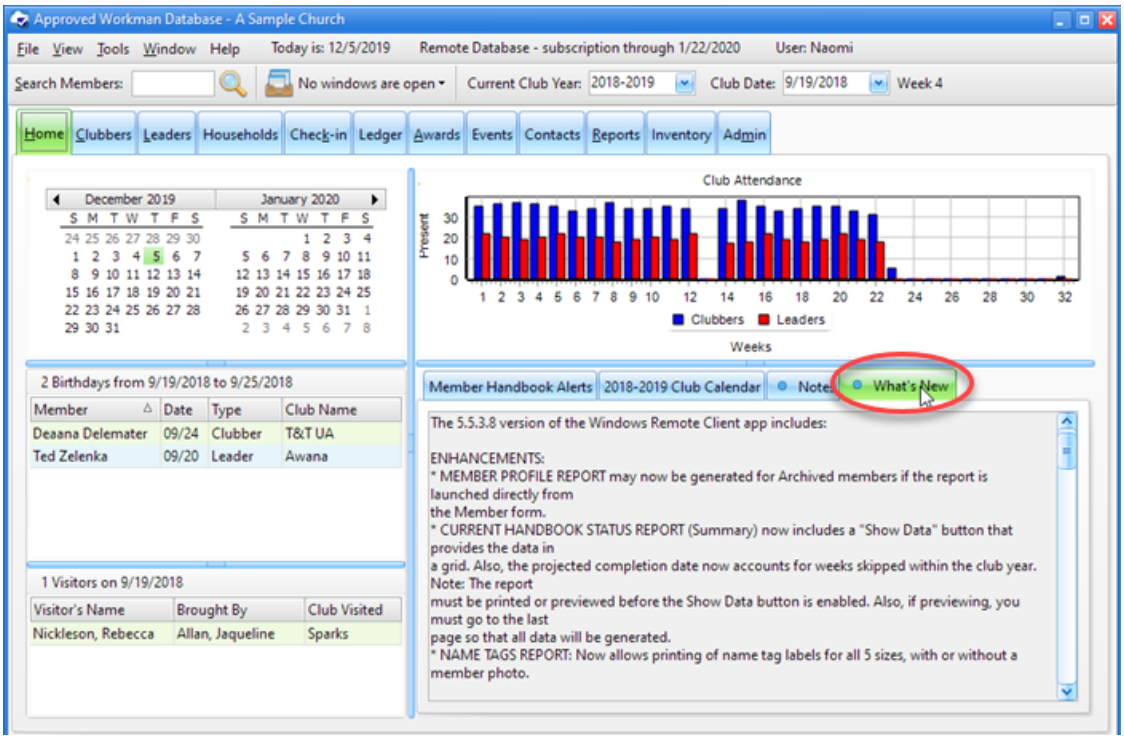
Chapter 7

7 The Home Page

The Home Page is initially selected in the Main Window after successfully logging in. It provides useful summary information for the current club year and current club date.

The page is divided into panels that can be resized by dragging the splitter that separates them. Once the panels are resized and the preferred layout is setup, including which tab to display by default, save the selections by going to the Main Window's Menu bar and choosing **View > Save Home Page Layout**.

To go back to the original layout settings, from the Main Window's Menu bar select **View > Reset Home Page Layout**.



- **Calendar -** defaults to the current Club Date / Year. Use the arrows to scroll to the previous or next month(s). The calendar panel can be resized by dragging the splitter at the right side or bottom. The number of months that are shown adjusts depending on the available space.
- **Birthdays** - lists which members have birthdays during the upcoming week.

The date range used in the Birthday section is the current club date through the next scheduled club date. If a week or two is skipped, such as for Christmas break, a two or three week span will be used so birthdays that fall during the break are not missed.

For a printed list of birthdays, use the Birthday List report in the Report Module.

- **Visitors** - lists visitors on the selected club date, including number of visitors, name of the visitor, who brought the visitor and what club was visited.
- **Club Attendance Chart** - displays attendance totals. Display options are available. See Customizing the Attendance Chart for more details.

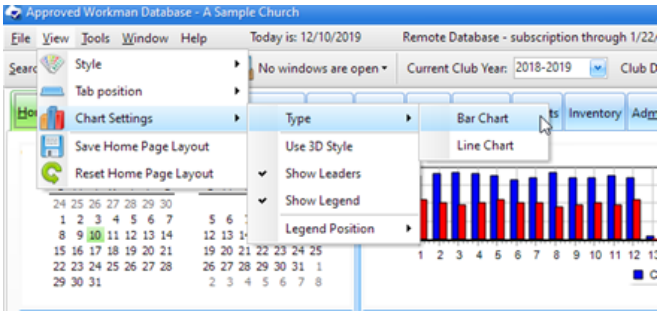
- **Clubber Handbook Alerts** - lists members who completed a handbook on the selected Club Date and those who are close to completing a book. This is a great tool for checking inventory for the next handbooks those clubbers will need and making sure any needed awards/prizes are available.
- **Club Calendar** - provides a summary of each club on each club date. Learn more in The Club Calendar section. Statistics are displayed in the status bar beneath the Club Calendar, including: Low, High and Average attendance numbers for both clubbers and leaders as well as a Clubber to Leader ratio.
- **Notes** - provides an area to keep notes. Instead of jotting something down on a sticky note, jot it down in the Note tab instead, so that it doesn't get lost!

  The same notes are available no matter which Club Year or Date is selected and are not reset during the New Year Setup.

- **What's New** - a list of enhancements and bug fixes for each new version that is released.

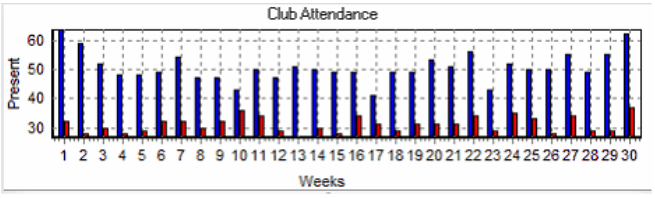
7.1 Customizing the Attendance Chart

There are several options available to customize the Chart on the Home Page. These are available either by selecting **View > Chart Settings** from the Main Window's Menu bar or by right clicking the **Attendance** panel on the Home Page and using the right click pop-up menu.

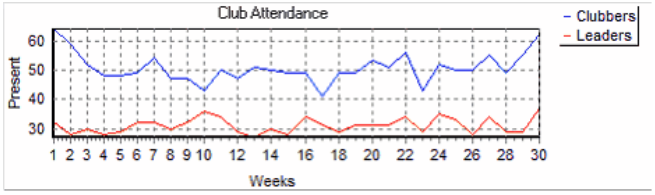


Choose from the following:

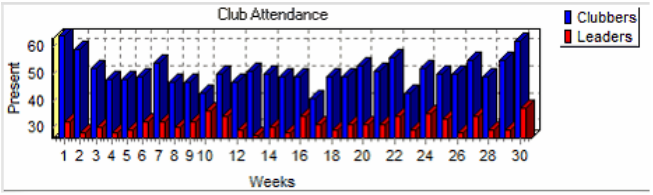
- **Type -** select from:
  - **Bar Chart** (default) -



  - **Line Chart**



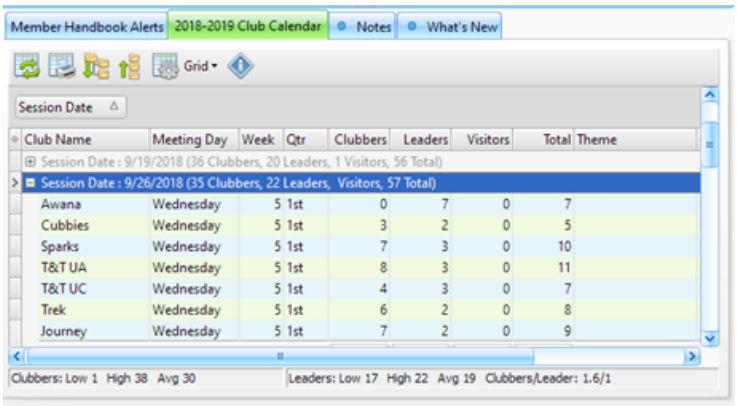
- **Use 3D Style -** applies to bars or lines within the chart



- **Show Leaders -** hide or show the leader statistics on the chart.
- **Show Legend -** hide or show the Legend for Clubber and Leader representation.
- **Legend Position -** select from:Top, Bottom, Left or Right.

7.2 The Club Calendar

The Club Calendar tab includes a summary of each of the clubs on each club date for the Current Club Year. Statistics are displayed in the Status bar beneath the Club Calendar. These include Low, High, and Average attendance numbers for both clubbers and leaders, and also a Clubber to Leader Ratio.



Preview/Print the grid and/or manipulate it as explained in working with grids. This grid is probably most useful when grouped by the **Date** column, so all of the clubs are grouped together for each club date. This shows the number of Clubbers, Leaders, Visitors, and Sections not only broken down by club, but also totaled in the group's footer.

Using this grid is the easiest way to determine in which Quarter a given club night falls. With the grid grouped by **Date**, expand the row of a given date to see the value in the **Qtr** column for a particular club. (Because different clubs could start and end on different dates, the Quarters could differ per week.)

The records shown in the Club Calendar are read-only. Admin users can edit the records under **Admin > Club Setup > Club Calendars**. **Themes** and **Notes** can also be added/edited there.

Chapter 8

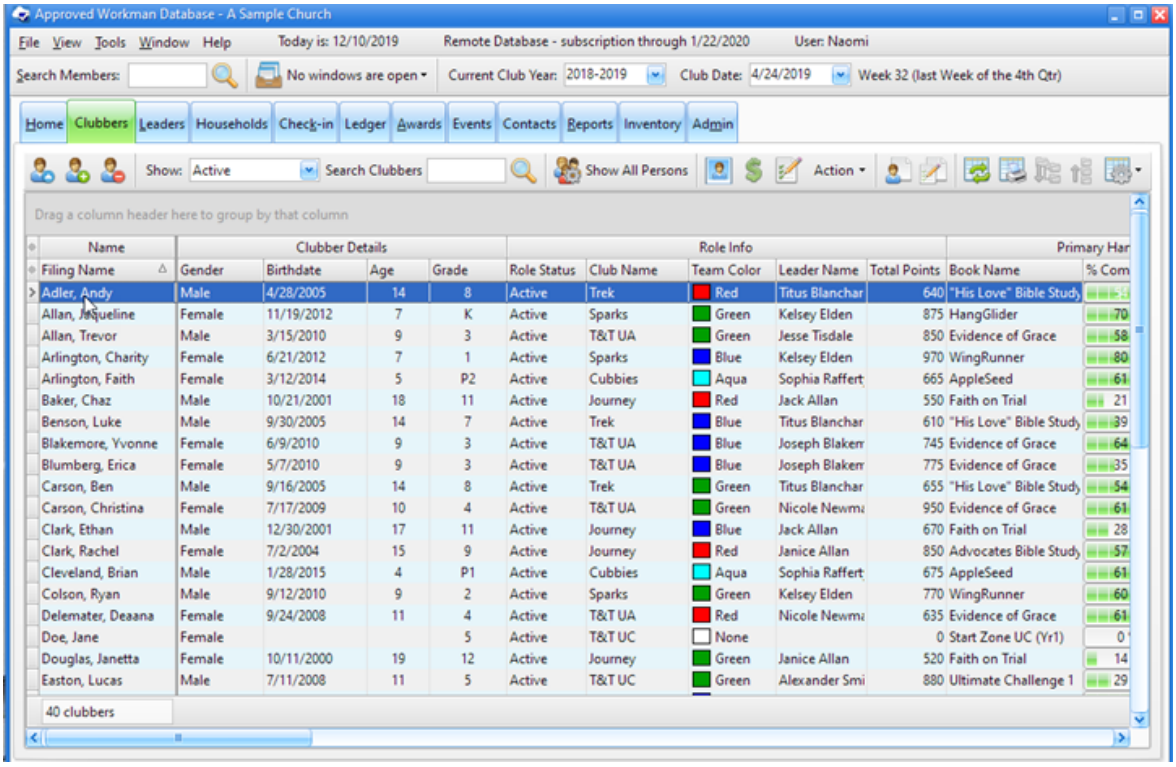
8 The Clubbers Module

The Clubbers Module provides a very flexible high level view of all the clubbers. Initially, the grid displays only clubbers with a role Status of "Active", but other status values can be selected, such as "Inactive" and "Prospect". The toolbar buttons or right click pop-up menu items provide a wide range of actions such as setting a clubber's Role Status, setting Registration to Current, setting Team Color or Team Name, or Assigning a Leader.

Only clubbers with a role in the current club year will be displayed. To locate a person without a role, use Search Members in the Main Toolbar or the Show All Persons button on the Clubbers toolbar.

Ad-hoc reports can be created to analyze club data by using the powerful features of the grid. Records can be filtered, sorted, and grouped. Hide bands and/or columns and print or export the data.

Most actions on this grid, including opening member records, opening household ledgers, printing Member Profile reports and printing Registration Forms, can be applied to multiple clubbers (up to 10) at one time using the multi-select ability.



Icon	Action	Description
	Open Clubber	Opens the selected clubber(s) whose individual data is then displayed in the Member Window. (Pressing the **Enter** key or double clicking the row also opens the member record.)
	New Clubber (Ctrl-N)	Opens the Member Window with blank/default values to create a new clubber.
	Delete Clubber(s) (Ctrl-D)	Removes the currently selected clubber(s). This process requires a confirmation. An option is also given to Archive the Member instead.
	Show	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) to display.
	Perform Search	Filters the grid to show only the clubbers whose names match the search criteria entered in the text field. (Pressing the Enter key also performs the search/filter.)
	Show All Persons	Changes the grid to show all Members regardless of status, type, or role. Only some fields will include information. Return to the Clubber data by choosing **reset grid layout** from the grid menu.
	View/Edit Photos	Opens the Photo dialog to manage photos. Defaults to the selected member.
	Open Household Ledger	Opens the Household Ledger for the selected clubber's family to manage fees and payments.
	Begin Registration Process	Opens the Registration Window Dialog for the clubber's family to manage registration related events.
	Assign Handbook*	Opens the Assign Handbook dialog to assign a new handbook to the selected clubber(s).
	Assign Uniform*	Opens the Assign Uniform dialog to assign a new uniform to the selected clubber(s).
	Assign a Leader*	Opens a dialog to assign a leader to the selected clubber(s).
	Set Status*	Sets the role status of the selected clubber(s) to one of the following: Active, Archived, Inactive, Prospect, Visitor.
	Set Team Color*	Sets the Team Color for the selected clubber(s).

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Icon	Action	Description
	Set Flag*	Sets a colored Flag for the selected clubber(s).
	Set Team Name*	Sets the Team Name for the selected clubber(s).
	Register and Post Payment*	Opens the Register and Post Payment Dialog to mark the Registration as current for the selected clubber(s).
	Copy E-mail Addresses*	Copies the e-mail addresses of all selected rows into clipboard memory so they can be pasted into an e-mail client. The addresses are separated by either semicolons or commas as indicated under **Admin > Users**. Don't paste e-mail addresses into the usual "To:" field; instead, use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	Copy Textible Phone Numbers*	Copies the textible phone numbers (that are then converted to e-mail addresses) of all selected rows into clipboard memory so that they can be pasted into an e-mail client. The addresses are separated by either semicolons or commas as indicated under **Admin > Users**. Don't paste e-mail addresses into the usual "To:" field; instead, use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	Print Member Profile	Opens the Member Profile report dialog to print a member profile for the selected clubber(s).
	Print Registration Form	Opens the Registration Form report dialog to print a registration form for the selected clubber's family.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

* These items are available from the **Action** drop-down menu on the Toolbar and/or the right click pop-up menu.

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Chapter 9

9 The Leaders Module

The Leaders Module provides a flexible high level view of volunteers. Initially the grid displays only leaders with a Status of "Active", but other status values can be selected, such as "Inactive", "Prospect", or "Visitor". The toolbar buttons or right click pop-up menu items provide a wide range of actions such as setting a leader's Role Status, Club Name and Leadership Role, Team Color, or Team Name.

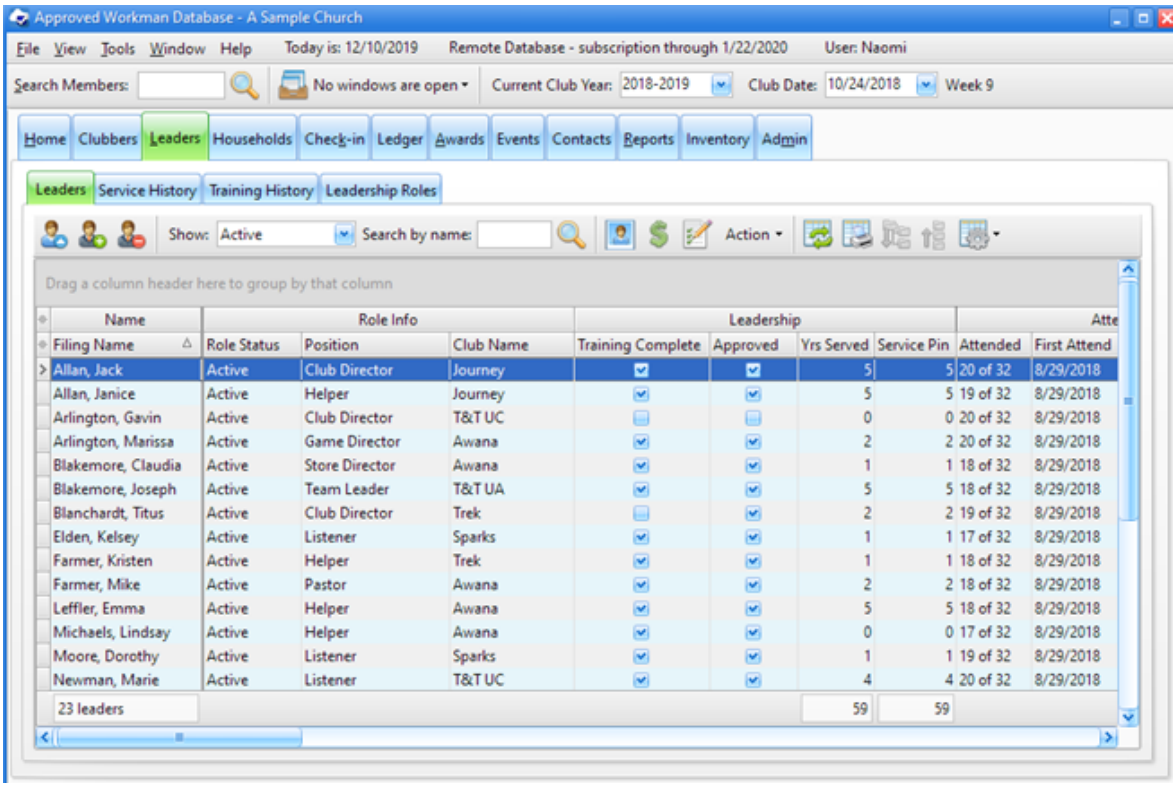
Ad-hoc reports can be created to analyze club data by using the powerful features of the grid. Records can be filtered, sorted, and grouped. Hide bands and/or columns and print or export the data.

While the Leaders Module works much like the Clubbers Module, there are a few differences. For example, the Leaders Module contains more than one grid, each displaying a different set of leader information such as Service and Training History, as well as Leadership Roles.

Most actions on this grid can be applied to multiple members using the multi-select ability.

Leaders

The **Leaders** page is displayed by default and provides general information about the leaders.



Icon	Action	Description
	Open Leader	Opens the selected leader whose individual data is then displayed in the Member Window. (Pressing the **Enter** key or double clicking the row also opens the member record.)
	New Leader (Ctrl-N)	Opens the Member Window with blank/default values to create a new leader.
	Delete Leader(s) (Ctrl-D)	Removes the currently selected leader(s). This process requires a confirmation.
	Show	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	Perform Search	Filters the grid to show only the leaders whose names match the search criteria entered in the text field. (Pressing the Enter key also performs the search/filter.)
	View/Edit Photos	Opens the Photo dialog to manage photos. Defaults to the current member.
	Open Household Ledger	Opens the Household Ledger for the selected leader's family to manage fees and payments.
	Begin Registration Process	Opens the Registration Window Dialog for the clubber's family to manage registration related events.
	Set Status*	Sets the status of the selected leader(s) to one of the following: Active, Archived, Inactive, Prospect, Visitor.
	Set Team Color*	Sets the Team Color for the selected leader(s).
	Set Flag*	Sets a colored Flag for the selected leader(s).
	Set Team Name*	Sets the Team Name for the selected leader(s).
	Set Training*	Sets "training has been completed" for the selected leader(s) to **Completed** or **Not Completed**.
	Set Approved for Leadership*	Sets "approved for leadership" for the selected leaders(s) to **Approved** or **Not Approved**.
	Register and Post Payment*	Opens the Register and Post Payment Dialog to mark the Registration as current for the selected leader(s).

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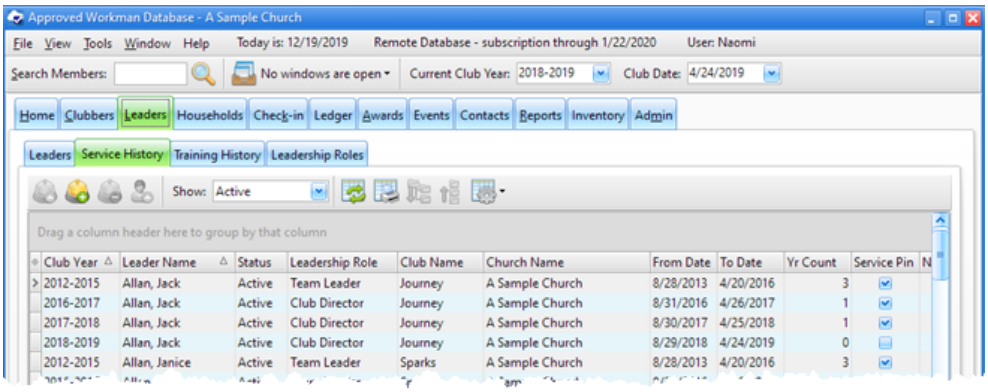
Icon	Action	Description
	Copy E-mail Addresses*	Copies the e-mail addresses of all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under **Admin > Users**. Don't paste e-mail addresses into the "To:" field. Use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	Copy Textible Phone Numbers*	Copies the textible phone numbers (that are then converted to e-mail addresses) of all selected rows into clipboard memory for pasting into an e-mail client. The addresses are separated by either semicolons or commas as indicated under **Admin > Users**. Don't paste e-mail addresses into the"To:" field. Use the "Bcc" (blind) field so that every recipient doesn't get a list of all addresses.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

* These items are available from the Action drop-down menu on the Toolbar and/or the right click pop-menu.

Service History

The **Service History** tab displays the service history details of each leader.

- Service History records are created automatically as leaders are created and assigned roles.
- Enter historical records for leaders to have an accurate count of total years served by using the **New Service** button on the toolbar.
- The most common roles are provided. The list of options can be customized under **Admin > Generic Lookups** > **Leadership Roles**.



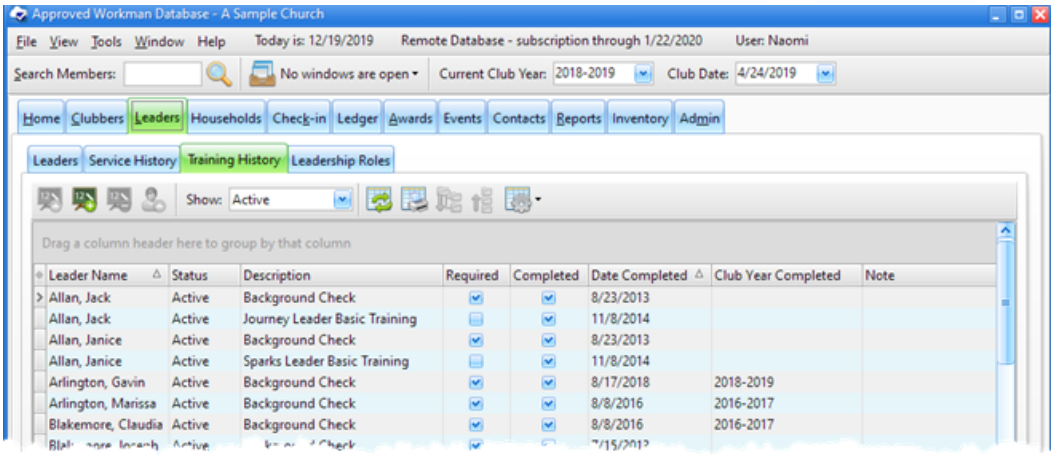
Icon	Action	Description
	Open Service Record	Opens the selected service record in the Service dialog. (Pressing the **Enter** key or double clicking the row also opens the record.)
	New Service Record (Ctrl-N)	Opens the Service dialog with blank/default values to create a new service record.
	Delete Service Record (Ctrl-D)	Removes the selected service record(s). This process requires a confirmation.
	Open Member	Opens the member record associated with the selected service record.
	Show	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

Training History

The **Training History** tab displays the training history details of each leader. It is easy to see which leaders have completed (or not completed) the required basic training and background checks.

- Enter Historical records for prior club years using the **New Leader Training** button on the toolbar.
- Some common training descriptions are provided. The list of options can be customized under **Admin > Generic Lookups** > **Leadership Training**.
- Choose to "**Automatically Add**" selected training items when a leader record is saved. Training items can also be set as **Required**. Set preferences under **Admin > Generic Lookups** > **Leadership Training.**

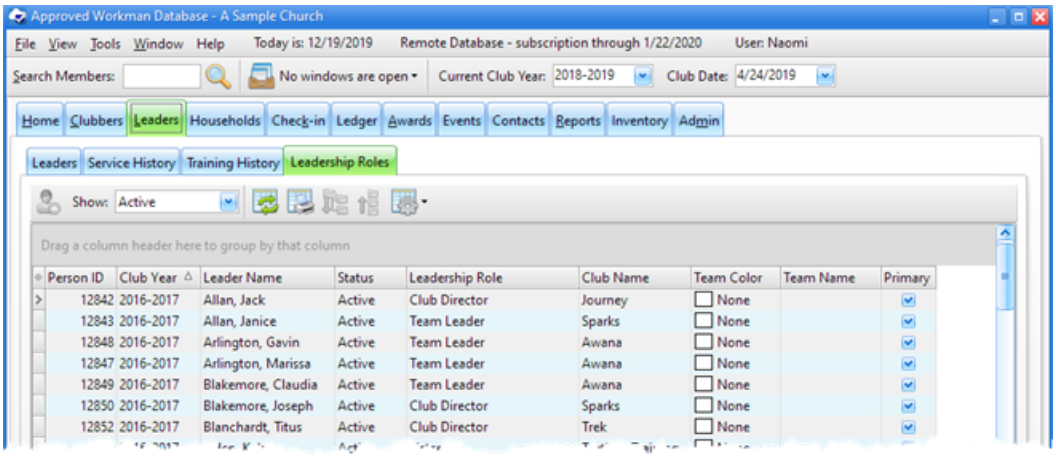
Customize the grid for ad-hoc reports.



Icon	Action	Description
	Open Training Record	Opens the selected training record in the Training dialog. (Pressing the **Enter** key or double clicking the row also opens the record.)
	New Training Record (Ctrl-N)	Opens the Training dialog with blank/default values to create a new training record.
	Delete Training Record (Ctrl-D)	Removes the selected training record(s). This process requires a confirmation.
	Open Member	Opens the member record associated with the selected training record.
	Show	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

Leadership Roles

The Leadership Roles tab displays all role records for each leader.



Icon	Action	Description
	Open Member	Opens the member record associated with the selected role record.
	Show	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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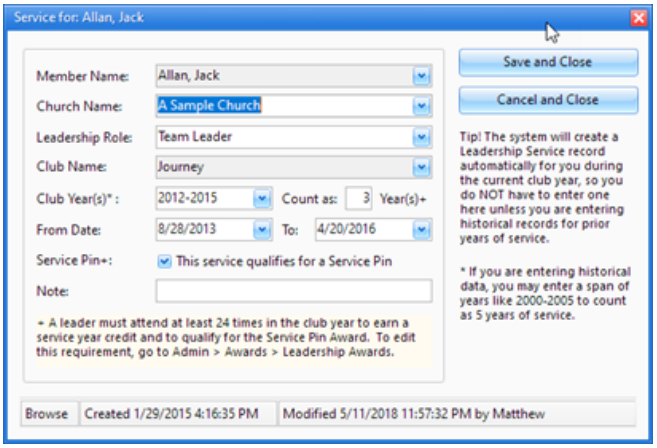
9.1 The Service Dialog

Opening or creating a service record opens the Service dialog to view, modify or enter details of a leader's service history.

Service history records are created automatically for current roles.

To speed the process of entering past **service history**, instead of selecting a specific club year from the drop-down list, type in a span of club years such as "2010-2018" to represent 8 years of service.



- **Member Name** - the leader who served
- **Church Name** - where the service was completed. Use **<New>** to add additional entries.
- **Leadership Role** - selection options are determined by **Admin > Generic Lookups** > **Leadership Roles**.
- **Club Name** - if the actual club name the leader served in is not listed, the generic "Awana" club may be used and a note added to the record with the specific club name.
- **Club Years -** a range of years may be entered. Examine **Count as # Year(s)** to be sure it is calculated correctly.
- **From Date - To Date -** specific dates (optional).
- **Service Pin** - indicates if **This service qualifies for a Service Pin**.

Each time attendance is recorded for a leader, the database checks the attendance criteria (**Admin > Awards > Leadership Service Awards**). When the criteria is met, the Service record is updated.

- **Note** - any additional information related to the service record.

Actions

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.

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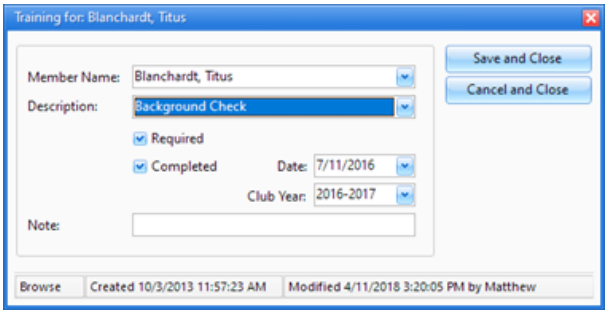
9.2 The Training Dialog

Opening or creating a new training record opens the Training dialog to view, modify or enter details of a leader's training history.

Training history records can be created automatically.



- **Member Name** - the leader who received training
- **Description -** selection options are determined by **Admin > Generic Lookups** > **Leadership Training**
- **Required** - indicates if a leader must have the training
- **Completed -** indicates if the leader has finished the training
- **Date Completed** - when **Completed** is set to **Yes**, the **Date Completed** field is enabled. Once entered, ensure that the **Club Year** was calculated correctly.
- **Note** - any additional information related to the training record

Actions

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.

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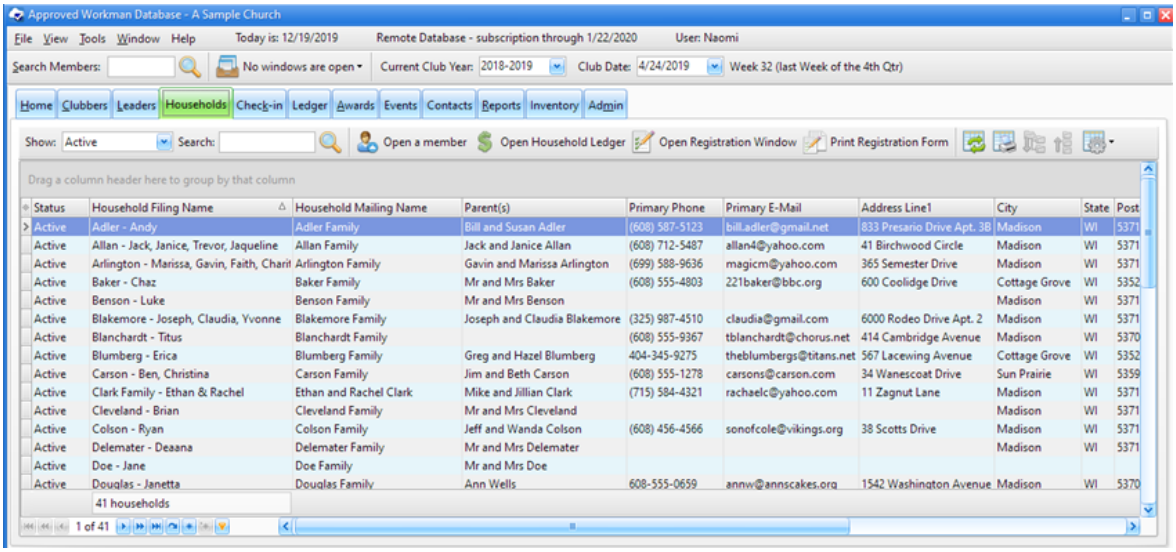
Chapter 10

10 The Households Module

The Households Module provides a view of all members grouped by family.



Icon	Action	Description
	Show	Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of households to display.
	Perform Search	Filters the grid to show only households whose names match the criteria entered in the text field. (Pressing the Enter key also performs the search.)
	Open Member	Opens a member from the household in the Member Window. (Additional members can be opened from the Household Members section of the Main tab.)
	Open Household Ledger	Opens the Household Ledger for the selected family to manage fees and payments.
	Open Registration Window	Opens the Registration Window Dialog for the selected family to manage registration related events.
	Print Registration Form	Opens the Registration Form report dialog to print a registration form for the selected clubber's family.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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Many of the actions are also available through the right click pop-up menu.

The right click pop-up menu provides an option to "Rederive the Household Filing Name". It will be derived from the **Last Name** followed by a dash and a list of all **Preferred (First) Names** of household members. Example: "Green - Sandy, Michael, Tina". In households that have persons with different last names, the last names are listed in alphabetical order, separated by "/". For example, for Rebecca Brown, Chad Smith and David Smith: "Brown/Smith - Rebecca, Chad, David".

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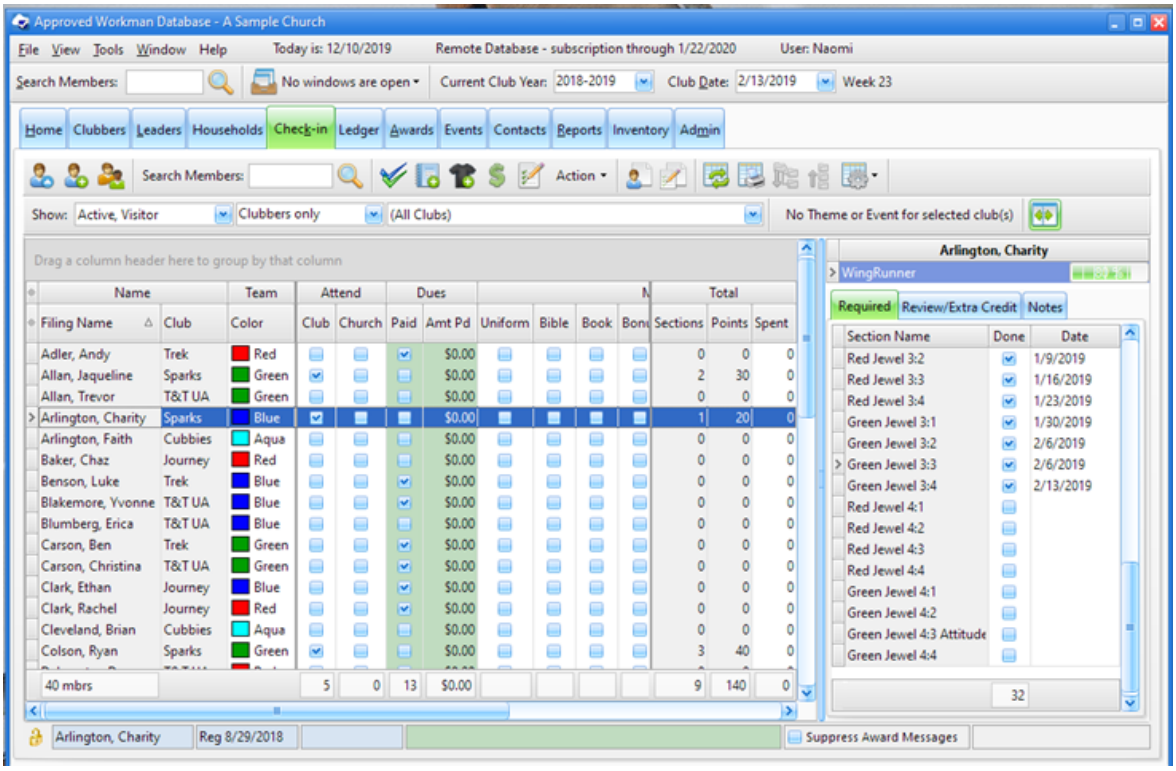
Chapter 11

11 The Check-in Module

The Check-in Module provides a way to quickly and easily track Attendance, Dues, Offerings, and other categories such as Uniform, Bible, Book, and Bonus, as well as add visitors and mark completed handbook sections. With each click, the section counts and point totals are updated and awards are automatically triggered when appropriate. The Check-in module efficiently handles the weekly recordkeeping tasks that would otherwise be a very tedious and time consuming job.

Details on the Check-in Module are divided into three sections: The Toolbar, The Check-in Grid, and The Sections Completed Grid.



Customizing the Check-in Grid

The Check-in grid can be customized to meet the different needs of each specific Awana Program to help maximize productivity.

One-time customizations:

1. Start by showing or hiding the columns based on what is used. For example, if Church Attendance is not tracked, hide the "**Attend Church**" column header. If weekly Dues payments aren't tracked, hide the "**Dues**" header band and all of the dues-related columns will be hidden.

When choosing to hide columns, be sure to understand the difference between a **header band** and a **column header**. In the above graphic, one header band is labeled **Misc.** Beneath **Misc** there are individual column headers labeled **Uniform**, **Bible**, **Book**, etc. Hiding a header band causes all of its column headers to also be hidden.

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2. To use the **Custom1** and **Custom2** check box columns, make them visible and then customize the Display Names under **Admin > Club Setup > Custom Fields**. Set the Custom columns' point values under **Admin > Club Setup > Club Names, Logos, Dues and Points**.

3. Resize column widths as desired by dragging a column header or a header band's right edge to the left or right. For example, if the **Church Attendance** column is hidden, the **Attend** header band can be resized so it is more narrow.

4. Save the desired settings! After adjusting the grid, click the Grid button in the toolbar and select **Save the current grid layout**. This ensures the Windows App sets things up the same way after the next log in.

The customized grid settings are saved per user. Each individual user can (and should) set preferred grid layouts. Each person using the database should have an individual User Account with a unique name and password.

Weekly customizations:

There are additional customizations that can be made each week to accomplish specific tasks. Here are a couple of examples:

1. When entering data from worksheets that are organized by Club Name, use the **Show:** club name drop-down check list to select only one club at a time to display. For example: To record attendance and handbook sections only for Sparks clubbers, reduce the number of rows in the grid by selecting "Clubbers" and "Sparks" in the **Show:** drop-down lists in the toolbar. Once data entry for Sparks is completed, select another club name, like T&T, to continue data entry for the next group.

   If you always limit the records displayed to a single club, try hiding the Club Name column in the grid to reduce horizontal scrolling.

2. When entering data from worksheets that are organized by Team Color for a single Club, after selecting the specific club to Show, group the records by Team Color.

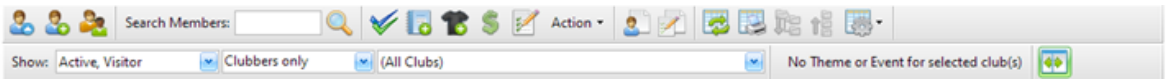
   Grouping by Team Color makes it easy to enter Game Points (if those are tracked). Also, statistics are shown for each node (in this case, each Team Color).

3. When entering data from worksheets for handbook section completion, filter the grid to show a selected Primary Handbook (like Grace in Action, or Appleseed). Further filter the grid to show those who attended on the given club date (Attend = true). This makes it it easy to multi-select records and mark the same handbook section for all of the members at once.

When the specific task is completed, use the Grid button and select **Reset Grid Layout** to return to your custom grid settings.

11.1 The Toolbar

The toolbar in the Check-in Module provides functionality that is generally needed during check-in time.



Icon	Action	Description

	Open Member	Opens the selected member whose individual data is then displayed in the Member Window. (Pressing the **Enter** key or double clicking the row also opens the member record.)
	New Member (Ctrl-N)	Opens the Add Member dialog with blank/default values to create a new member.
	Add a Visitor	Opens the Add a Visitor dialog to add a visitor brought by the selected member.
	Perform Search	Filters the grid to show only those members whose names match the search criteria entered in the text field. (Pressing the **Enter** key also performs the search/filter.)
	Speed Check	This is a toggle button that can be turned on or off. When on, other check boxes are automatically selected when a member's Club Attendance is marked. Set preferences under **Admin > Options > Check-In**.
	Assign Handbook	Opens the Assign Handbook dialog to assign a new handbook to the selected member(s).
	Assign Uniform	Opens the Assign Uniform dialog to assign a new uniform to the selected member(s).
	Open Household Ledger	Opens the Household Ledger for the selected member's family to manage fees and payments.
	Begin Registration Process	Opens the Registration Window Dialog for the member's family to manage registration related events.
	Set Attendance*	**Present** - marks the attendance check box for the selected member(s). **Not present** - clears the attendance check box for the selected member(s). Use this with the multi-select ability of the grid to quickly mark (or clear) attendance for multiple members at one time.
	Set Status*	Sets the role status of the selected member(s) to one of the following: Active, Archived, Inactive, Prospect, Visitor.
	Set Flag*	Sets a colored Flag for the selected member(s).
	Set Team Name*	Sets the Team Name for the selected member(s).
	Register and Post Payment*	Opens the Register and Post Payment Dialog to mark the Registration as current for the selected member(s).

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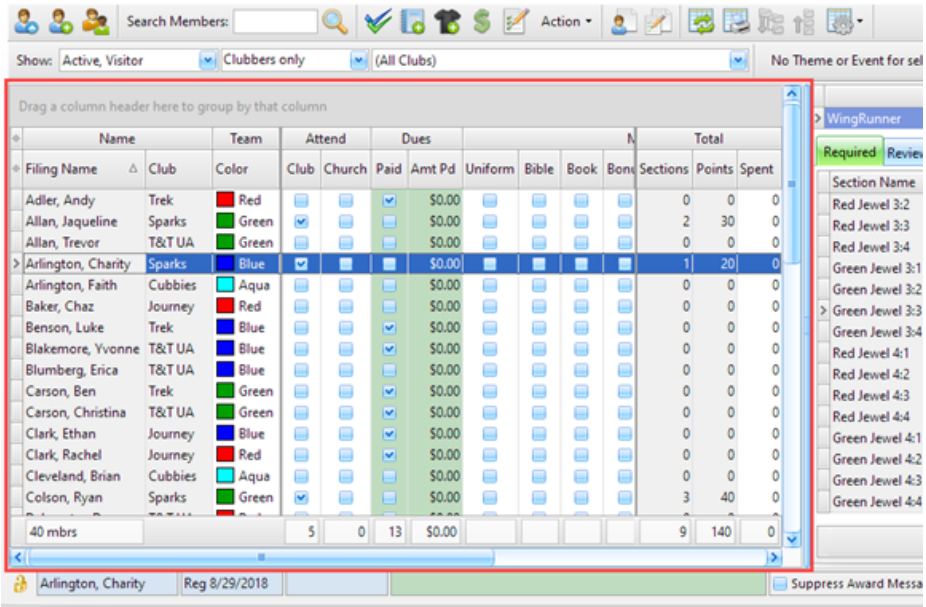
	Excuse*	Marks the club and/or church attendance for the selected member, or all members, as excused. If a club night is canceled, the date can be deleted (under **Admin > Club Setup > Club Calendars**) instead.
	Clear excused*	Marks the club and/or church attendance for the selected member, or all members, as unexcused.
	Clear all Team Colors for this week*	Clears all the Team Color values in preparation to reassign new ones. When using Team Colors to group clubbers only for games (and not handbook time), this helps keep track of who has/has not been re-assigned.
	Reset all Team Colors for this week*	Resets all current Team Color values according to each member's base color (from the Member's Main tab.)
	Print Member Profile	Opens the Member Profile report dialog to print a member profile for the current member.
	Print Registration Form	Opens the Registration Form report dialog to print a registration form for the selected member's family.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data..
	Show	Filters the data in the grid based on Status, Member Type and/or Club Name. Select the boxes in each of the drop-down lists to indicate the status(es), member type(s) and/or club(s) to be displayed in the grid.
	Theme	Displays the theme if a particular Theme is set in the club session records for the current club date (under **Admin > Club Setup > Club Calendars**).
	Show/Hide Handbook Sections	This is a toggle button that can be turned on or off. When on, the Handbook Sections grid is displayed making it easy to record completed sections. When off, the grid will be hidden to allow more space for the Check-in Grid. (The panel can be manually re-sized by grabbing and dragging the edge.)

* These items are available from the **Action** drop-down menu on the Toolbar and/or the right click pop-up menu.

11.2 The Check-in Grid

Use the Check-in grid to perform data entry tasks related to tracking Check-in items such as: **Club** and **Church Attendance**, **Dues Pd**, **Offering Amount**, **Uniform**, **Bible**, **Book**, **Bonus**, **Visitors**, **Game Points**, etc. Most columns are check boxes for quick and easy data entry. Some columns, like **Game Points** and **Other**, allow numeric values to be typed directly in the grid.



Key Points

- Remember to customize the grid as desired.
- Use the **Show:** components in the toolbar to get a custom view for a specific data entry task. For example, set the grid to show only Active clubbers in Sparks.
- Use the incremental search capability to quickly locate a specific clubber. For example, click anywhere in the **Last Name** or **First Name** column then start typing a few characters and the focused row will move to the matching record. To release the incremental search, press **ESC**.
- Turn on the **Speed Check** feature to avoid constantly repeating clicks for **Uniform**, **Bible**, and **Book**, so those columns are automatically checked as soon as the **Attend Club** column is checked. Configure which check boxes are affected under **Admin > Options > Check-In**.
- Mark (or clear) attendance for multiple members at once by multi-selecting records and using the **Action** drop-down menu or right click pop-up menu option of **Set Attendance > Present/Not present**.
- Click in the **Game Points** cell and type the actual numeric value to enter points earned for Game Time.

To award points to everyone on a particular Team Color, drag the Team Color column header into the area above the grid to group the records. All of the Blue Team members are together, then Green members, etc. Type the number of points to award in the **Game Points** cell, then press the down arrow and type the point value and then press the down arrow until all of the rows for that team are completed. (You might first want to filter the attend column to show only those who attended.)

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- Change the **Team Color** assignment by clicking the cell and selecting a different color. A change in **Team Color** applies to only the current week or all future weeks, depending on the response to the pop-up dialog. The Team Color value for prior weeks is not changed in order to preserve historical data. To change the Team Color for a prior week, adjust the Current Club Date in the main toolbar prior to making the change or open the Member record and make the change on the Attendance tab for the desired week.
- Excuse an absence by selecting a clubber/s and then using the **Excuse >** item under the **Action** menu (or from the right click pop-up menu).
- View valuable statistics by grouping on Team Color, Team Name, or Leader Name. Drag the appropriate column header into the grouping area above the grid and notice the statistics shown for each node: **Number of Members, Number Present, Total Points, Average Points Per Clubber, Total Required Sections completed, and Average Number of Sections per Clubber**.
- Create ad-hoc reports using the Preview/Print feature.

Dues and Posting payments

- Hide the **Dues** header band if weekly dues payments are not collected.
- If weekly dues payments are collected, click the **Dues Pd** check box when a single weekly dues amount is received. However, if weekly dues are $0.50 but a clubber pays $1.00 or more, type over the default **Dues Amt Pd** and change it the received amount.
- Any amount entered in the **Dues Amount Pd** cell is assumed to be cash and is applied exclusively to the dues for the selected clubber only. Thus, if dues money is paid that is for more than one clubber, mentally divide up the amount and apply it to each clubber separately.
- For money received for books and uniforms, do NOT check the **Dues Pd** check box or type any value in the **Dues Amt Pd** field. Instead, open the Household Ledger and post the payment there. Any money applied to Fees representing Dues will cause the Check-in grid's Dues related check boxes and fields to be automatically filled in.

A quick way to open the Household Ledger is to use the money sign button in the toolbar.

11.3 The Sections Completed Grid

The Sections Completed grid, located in the Check-in Module, is one of two ways to record completed handbook sections. It is useful for marking sections complete during club since it is faster than opening each member's record and marking sections completed on the Handbook page.

If the Sections Completed grid is not showing, select the **Show/Hide the Handbook Sections** toggle button near the right side of the toolbar.

- Select a row in the Check-in grid. The member's Sections Completed grid is displayed on the right side of the screen.

For quicker data entry for clubs that all work on the same section, like Cubbies or T&T, select multiple members that all completed the same section and then mark the section completed. All of the selected members' handbooks will be updated. Showing the Primary Handbook in the grid for each member and filtering or grouping the grid will help with selection.

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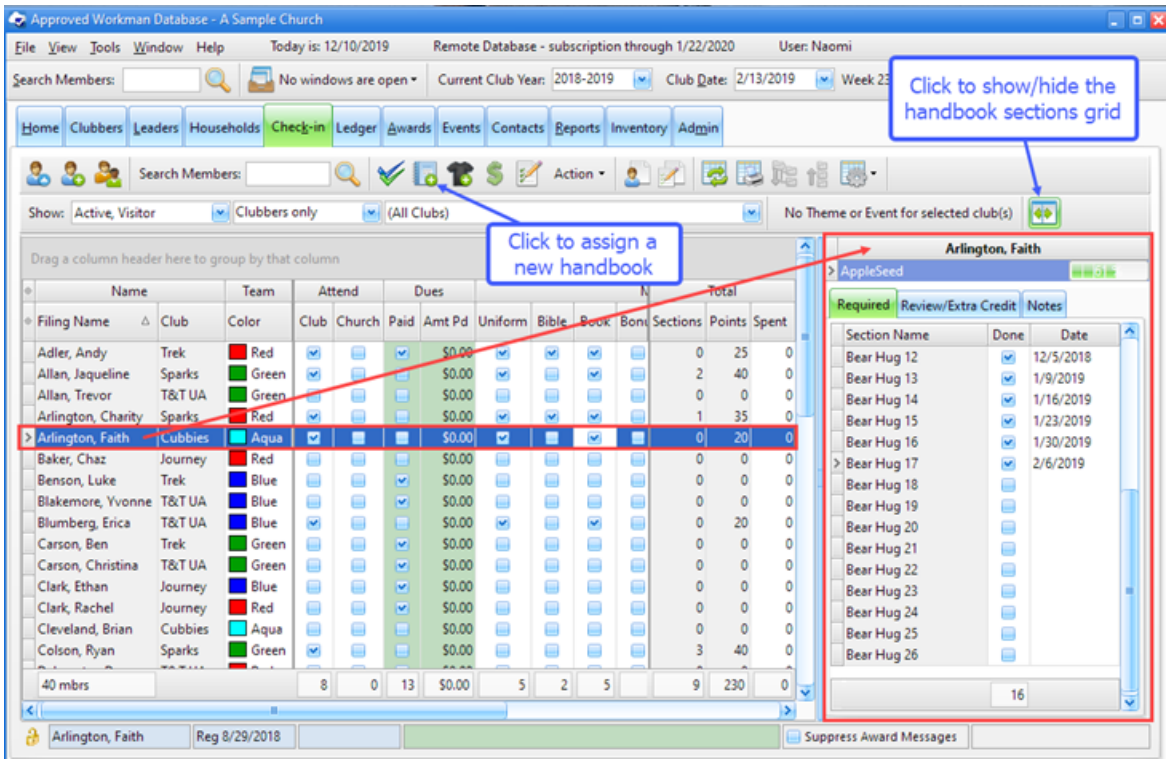


- **Member name, current handbook(s), handbook percentage completed** - displayed above the handbook section grid. If there is more than one handbook, select which handbook to show.

  If the correct handbook is not displayed, open the Member record. Under the Handbooks tab, mark an already assigned book as "Current" or Assign a new handbook.

- **Required** tab - sections a clubber must complete to earn a book award.
  - The Sections Completed grid automatically scrolls to display the incomplete sections.
  - Mark the **Done** check box to indicate a section has been completed. The current club date is used as the **Date** of completion, but can be changed.

    For the clubber to be credited properly and weekly statistics to be accurate, be sure to select a valid club date.

  - Clear the **Done** check box to remove a completed section. Related awards will also be removed.
  - An Award Message dialog opens when an award is earned by completion of a section. Select whether or not the Award was **Received** then click **OK**. (Set a default for **Award was Received** under **Admin > Options > Misc**.)

- **Review/Extra Credit** tab - additional sections that a clubber can complete. This grid operates like the required sections grid.
- **Notes** - any additional information related to the assigned handbook for this member.

Chapter 12

12 The Ledger Module

Dealing with fee and payment transactions can be a cumbersome and confusing job. The Ledger Module eases that burden by providing a way to track all fees and payments and see the big picture view for the entire club. It also provides a detailed view of the financial records for each individual and household. The Household Account Statement report can be used as an invoice to keep families informed of purchases and balances. The Receipts Report can provide a detailed accounting of the monies received for the church treasurer.

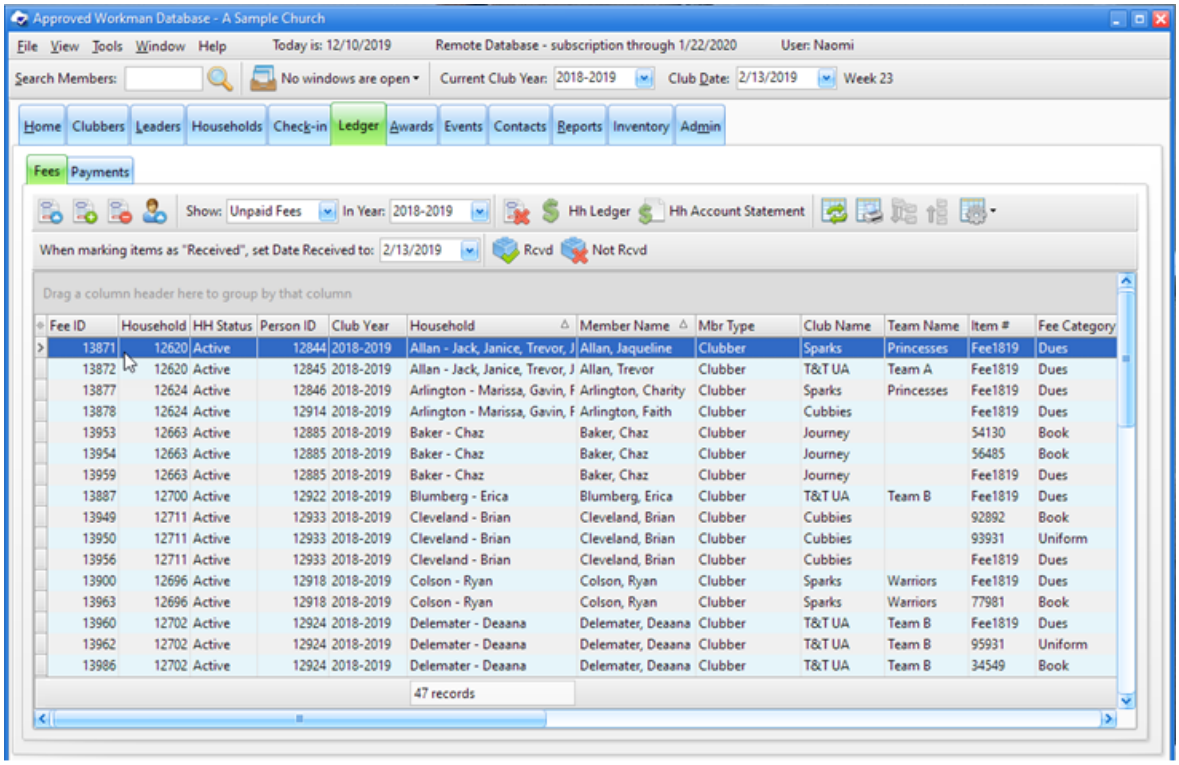
The Ledger Module includes tabs for Fees and Payments as well as access to a selected member's Household Ledger. For an overview, see Working with the Ledger.

Most actions on these grids, including marking items as received or not received, can be applied to multiple rows at once using the multi-select ability.

12.1 Fees

The **Ledger > Fees** tab shows fees for all households in the database. This shows at a glance the money received on a particular night (or for the entire year) and also how much money is still due. The grid can be filtered by **Item Rcvd** to see which members are still waiting to receive a book or uniform that had been ordered. This grid is also helpful when monitoring a budget. As an example, if scholarships are provided, apply a filter to show **Dues?** = False and **Waived** = true in order to show how much the church spent for books and uniforms of scholarship kids. (The payment type of "Waived" is used to indicate that the balance on a particular Fee was paid by the club, often through the use of Scholarship funds.)

There are lots of other ways to use the grid to analyze your data.



Fee ID	Household	HH Status	Person ID	Club Year	Household	Member Name	Mbr Type	Club Name	Team Name	Item #	Fee Category
13871	12620	Active	12844	2018-2019	Allan - Jack, Janice, Trevor, J	Allan, Jaqueline	Clubber	Sparks	Princesses	Fee1819	Dues
13872	12620	Active	12845	2018-2019	Allan - Jack, Janice, Trevor, J	Allan, Trevor	Clubber	T&T UA	Team A	Fee1819	Dues
13877	12624	Active	12846	2018-2019	Arlington - Marissa, Gavin, F	Arlington, Charity	Clubber	Sparks	Princesses	Fee1819	Dues
13878	12624	Active	12914	2018-2019	Arlington - Marissa, Gavin, F	Arlington, Faith	Clubber	Cubbies		Fee1819	Dues
13953	12663	Active	12885	2018-2019	Baker - Chaz	Baker, Chaz	Clubber	Journey		54130	Book
13954	12663	Active	12885	2018-2019	Baker - Chaz	Baker, Chaz	Clubber	Journey		56485	Book
13959	12663	Active	12885	2018-2019	Baker - Chaz	Baker, Chaz	Clubber	Journey		Fee1819	Dues
13887	12700	Active	12922	2018-2019	Blumberg - Erica	Blumberg, Erica	Clubber	T&T UA	Team B	Fee1819	Dues
13949	12711	Active	12933	2018-2019	Cleveland - Brian	Cleveland, Brian	Clubber	Cubbies		92892	Book
13950	12711	Active	12933	2018-2019	Cleveland - Brian	Cleveland, Brian	Clubber	Cubbies		93931	Uniform
13956	12711	Active	12933	2018-2019	Cleveland - Brian	Cleveland, Brian	Clubber	Cubbies		Fee1819	Dues
13900	12696	Active	12918	2018-2019	Colson - Ryan	Colson, Ryan	Clubber	Sparks	Warriors	Fee1819	Dues
13963	12696	Active	12918	2018-2019	Colson - Ryan	Colson, Ryan	Clubber	Sparks	Warriors	77981	Book
13960	12702	Active	12924	2018-2019	Delemater - Deaana	Delemater, Deaana	Clubber	T&T UA	Team B	Fee1819	Dues
13962	12702	Active	12924	2018-2019	Delemater - Deaana	Delemater, Deaana	Clubber	T&T UA	Team B	95931	Uniform
13986	12702	Active	12924	2018-2019	Delemater - Deaana	Delemater, Deaana	Clubber	T&T UA	Team B	34549	Book

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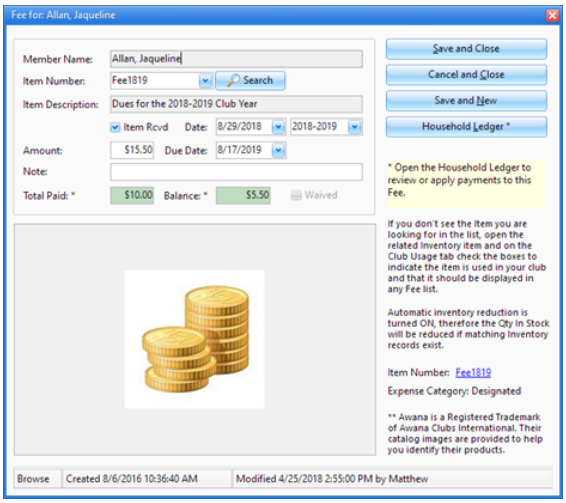
Icon	Action	Description
	Open Fee	Opens the selected fee in the Fee dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the fee.)
	New Fee (Ctrl-N)	Opens the Fee dialog with blank/default values to create a new fee.
	Delete Fee(s) (Ctrl-D)	Removes the selected fee(s).
	Open Member	Opens the member record for the person who incurred the selected fee.
	Show	Filters the data in the grid. Choose to show **All Fees**, **Paid Fees**, or **Unpaid Fees**. **Show In Year:** limits records to fees in the selected club year.
	Waive Fee(s)	Waives any balance on the selected Fee(s). This creates a payment record of type "Waived" and lists your club name as the Payor.
	Open Household Ledger	Opens the Household Ledger for the selected member's family to manage fees and payments.
	Hh Account Statement	Opens the Household Account Statement report dialog. The selection criteria defaults to the selected member's household.
	Rcvd	Marks the selected fee item(s) as having been received by the member. When marking items as "**Received**", set **Date Received to:** defaults to the current club date. When working with items received on a different date, change the date before clicking the **Rcvd** button.
	Not Rcvd	Marks the selected fee item(s) as *not* having been received by the member yet.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

12.1.1 The Fee Dialog

Opening or creating a fee displays the Fee dialog to view, modify, or enter the details of a fee.



- **Member Name** - member who incurred the fee
- **Item Number** and **Item Description** - selection can be done using either field. The lists are populated with items marked to be used in Fee lists in the Inventory record. When one is selected, the other field is filled in automatically. Images from the Inventory record are shown.

  The **Search** button opens the Inventory Quick Reference to help select the correct item.

  If an item isn't listed, but it IS in the main Inventory List, open the item from the Inventory Module . Click the **Club Usage** tab. Ensure **Use this item as a choice in any... drop-down list** is selected.

  For new book or uniform fees, an option to assign the book or uniform will be given.

- **Received** - selecting **Yes** enables the **Date Rcvd** field. Verify the **Club Year** is correct.
- **Amount** - total money the member should pay for the item. It is initially set by the item's **Sell Price** in the Inventory records, but can be edited. To update the **Sell Price** so future Fees are correct, use the **Item Number** link in the lower right to open the Inventory Item.
- **Due Date** - when the fee should be paid by the member
- **Note** - any additional information related to this fee
- **Total Paid** and **Balance** - read-only fields; calculated based on payment(s) applied to the fee

Actions

- **Save and Close** - saves the record and closes the dialog.

  Click **Save and New** to save the fee then clear the fields of the dialog to quickly create another fee.

- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **Household Ledger** - opens the Household Ledger for the member who incurred the fee. The Fee dialog automatically saves and closes, then the Household Ledger opens.

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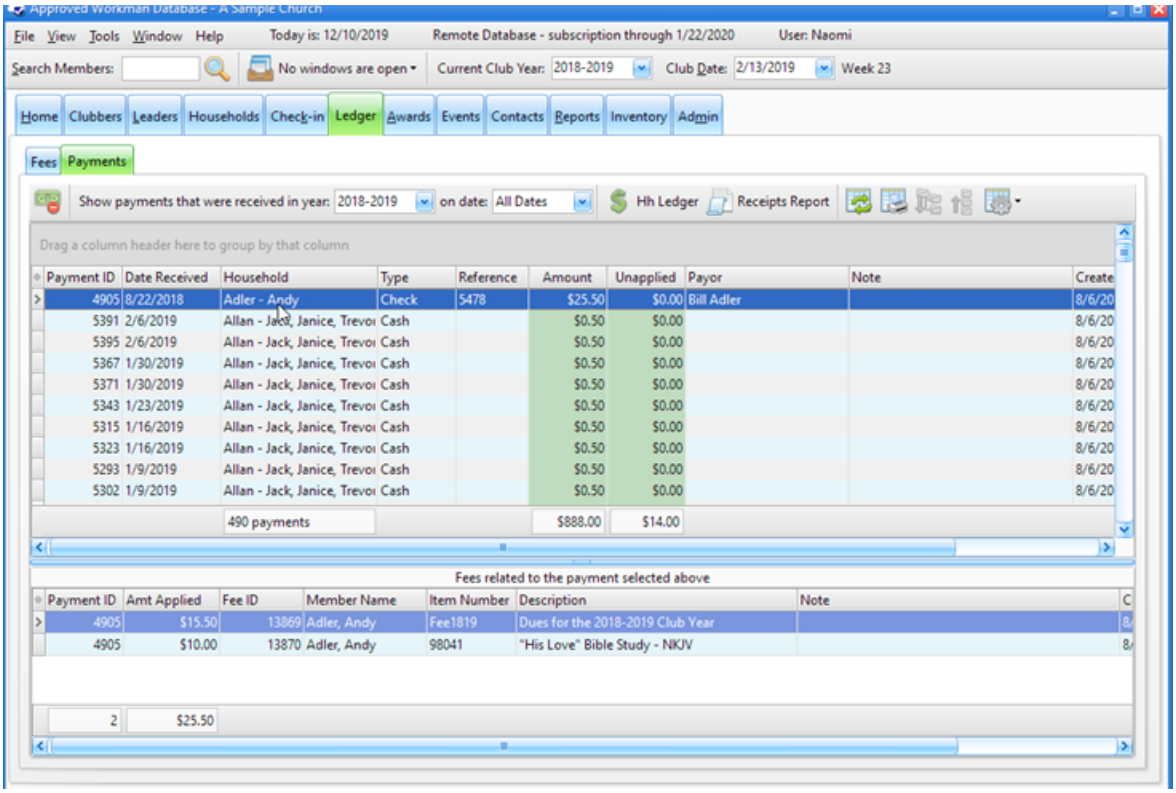
12.2 Payments

The **Ledger > Payments** tab shows payments for all households. It defaults to payments received on the Current Club Date. A different date can be selected or choose "All Dates". When a record is selected, the grid at the bottom shows all the fees to which the payment was applied.

Grouping records will show item counts and subtotals. Example: group by **Type** for a count of cash payments, checks, and waived payments. The grand total is also listed in the grid footer.



Icon	Action	Description
	Delete Payment	Removes the selected payment(s). A confirmation is required.
	Show	Filters the data in the grid based on **Club Year** and **Club Date**. The Club Year defaults to the current club year, but can be changed. Select a specific club date within that year or choose to show **All Dates**.
	Open Household Ledger	Opens the Household Ledger for the selected member's family to manage fees and payments.
	Receipts Report	Opens the Receipts Report dialog to set parameters for a report listing payments grouped by **Date Received** and **Type**.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

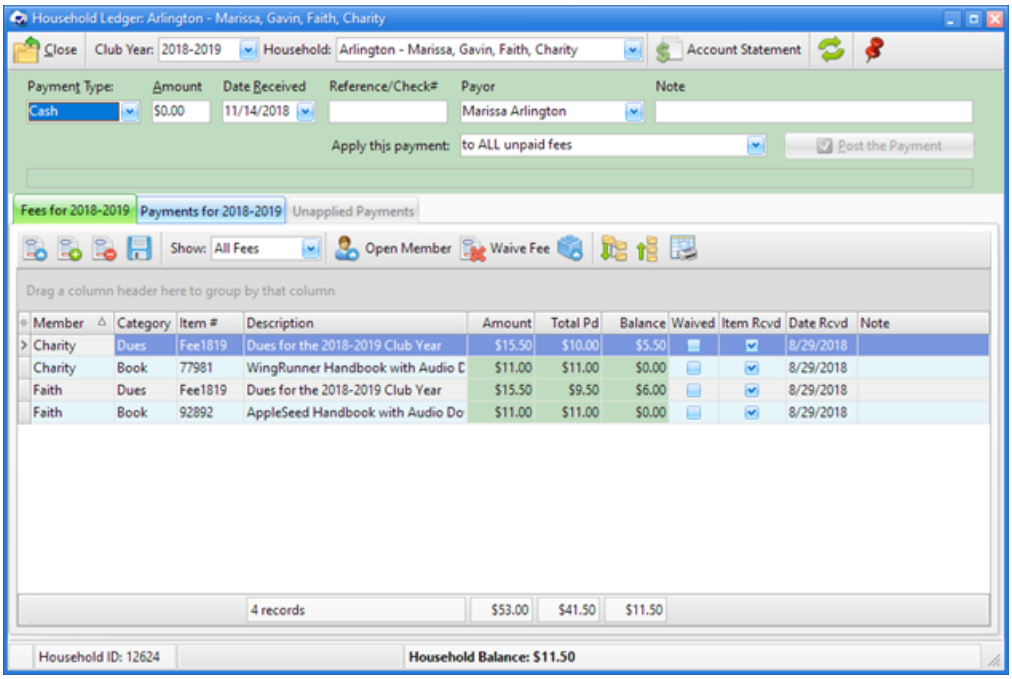
12.3 The Household Ledger

The Household Ledger displays the fees and payments for all members of a specific household. This makes it easy to see the bottom-line total a family owes. It also provides details for any fee and the payments applied to it. Conversely, it shows payment records and fees to which they were applied.

Open a selected member's Household Ledger from the:

- Check-in Module, Clubbers Module, Leaders Module: right click pop-up menu item
- Households Module,or Ledger Module toolbar: **Household Ledger** button
- Member Window toolbar: **Household Ledger** button
- Fee Dialog: **Household Ledger** button

Use the top section of the Household Ledger to post payments. The lower section contains three tabs: **Fees**, **Payments**, and **Unapplied Payments**. See the **Fees** and **Payments** topics below for details.



Icon	Action	Description
	Close	Closes the window.
	Show Club Year	Filters the items in the ledger based on **Club Year**. Defaults to the current club year, but can be changed.
	Show Household	Filters the items in the ledger based on the selected Household. To switch to another household's data, select a household name from the drop-down list.

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	Account Statement	Opens the Household Account Statement report dialog. The selection criteria defaults to the selected household.
	Refresh	Refreshes the data in the grid. If there is a concern about viewing the latest data, simply click this button.
	Stay On Top	Toggles whether or not the window will stay on top of the main window.

- To filter the grids in all three tabs, use the **Club Year** drop-down list to select a club year's ledger information. Use the **Household** drop-down list to switch to a different household.

Fees

Besides fees for dues, a fee should be created whenever a member receives an item for which payment is expected. Fees for dues, handbooks, and uniforms can be automatically created when registration is set as current and when a new handbook or uniform is assigned. Other fees, like bags or replacement awards, need to be created manually. View a list of all fees by clicking the **Fees for [club year]** tab.

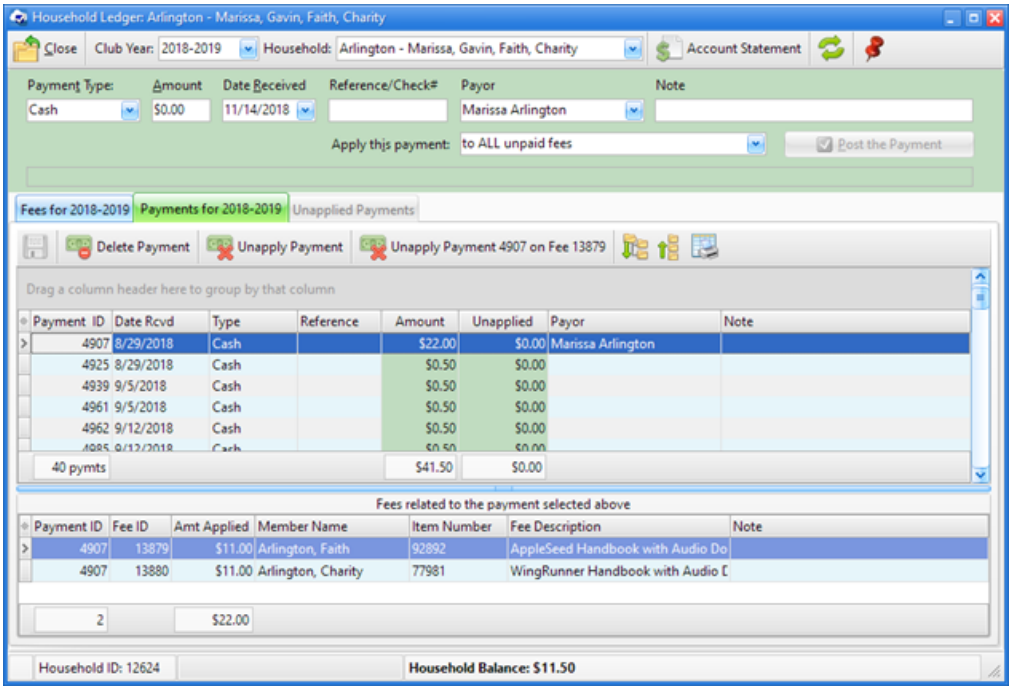
Fees Toolbar:

Icon	Action	Description
	Open Fee	Opens the selected fee in the Fee dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the fee.)
	New Fee	Opens the Fee dialog with blank/default values to create a new fee for this member.
	Delete Fee	Removes the selected fee. This process requires a confirmation.
	Show	Filters the data in the grid. Choose to show **All Fees**, **Paid Fees**, or **Unpaid Fees**.
	Open Member	Opens the selected member whose individual data is then displayed in the Member Window. (Pressing the **Enter** key or double clicking the row also opens the member record.)
	Waive Fee(s)	Waives any balance on the selected Fee(s). This creates a payment record of type "Waived" and lists your club name as the Payor.
	Open Inventory Item	Opens the selected item in the Inventory Item window. (Pressing the **Enter** key with a row selected or double clicking the row also opens the inventory item.)

Manipulate the grid as explained in working with grids.

Payments

When members make payments, keep track of who paid and for what. Use the top section of the Household Ledger to post payments. Fee records are not required before posting a payment. Payments not applied to a fee are tracked as "Unapplied" and can be applied later when fees are created. This is common at the beginning of a club year when payments might be made before fees are created. When a record is selected, the grid at the bottom shows all the fees to which the payment was applied.



Posting a Payment

1. Enter the following information in the top portion of the Household Ledger window:

- **Payment Type** - **Cash**, **Check**, **Credit Card, Debit Card, Discount**, **Money Order**, **Online**, **Other, Waived**

  Waive a fee by applying a payment to a fee and setting its **Payment Type** to **Waived**.

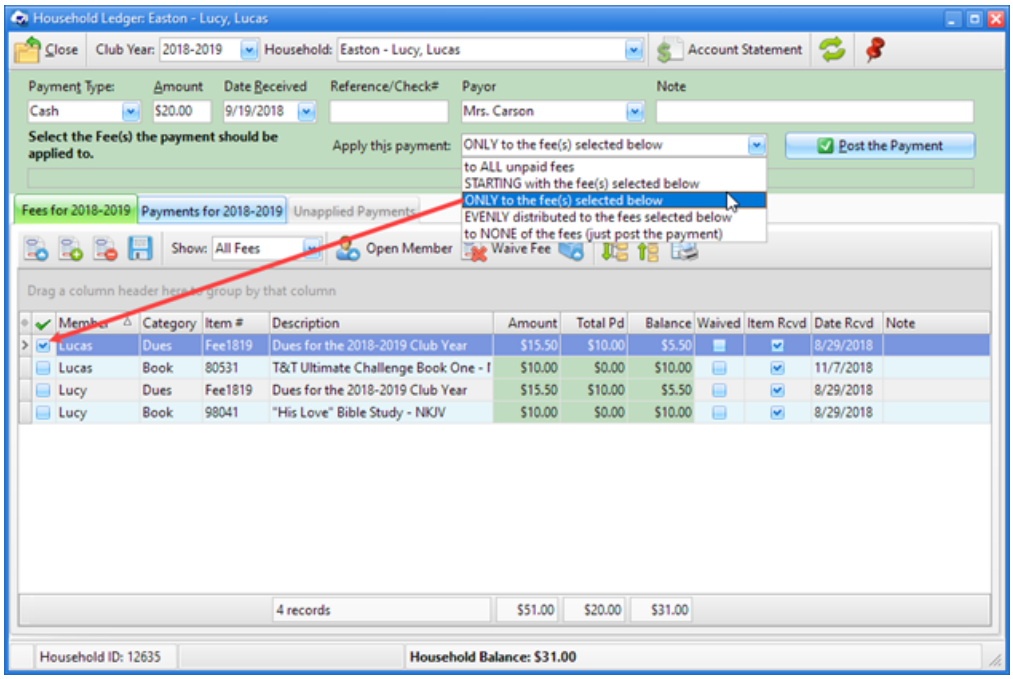
- **Amount -** total money paid
- **Date Received** - defaults to the current date
- **Reference** - any information useful in referencing the payment; for example, a Check #.
- **Payor** - person making the payment

  Payors in each household are remembered and displayed in the drop-down list.

- **Note** - any additional information related to the payment

2. Select how to Apply the payment. Choose one of the following:

- **to ALL unpaid fees -** the Windows App logically considers all unpaid fees, applying payment to non-dues fees first, then to other fees until the money is spent.
- **STARTING with the fee(s) selected below -** on the **Fees for [club year]** tab, select at least one fee for the payment to cover. If there is money remaining after the selection(s), the logic above is used.
- **ONLY to the fee(s) selected below -** on the **Fees for [club year]** tab, select fees to which the payment will be applied.



- **EVENLY distributed to the fees selected below** - on the **Fees for [club year]** tab, select the fees to which the payment will be distributed.

  The amount to be applied to each fee is shown in the top section under the payment type field.

- **to NONE of the fees (just post the payment) -** an Unapplied Payment is created for the entire amount.

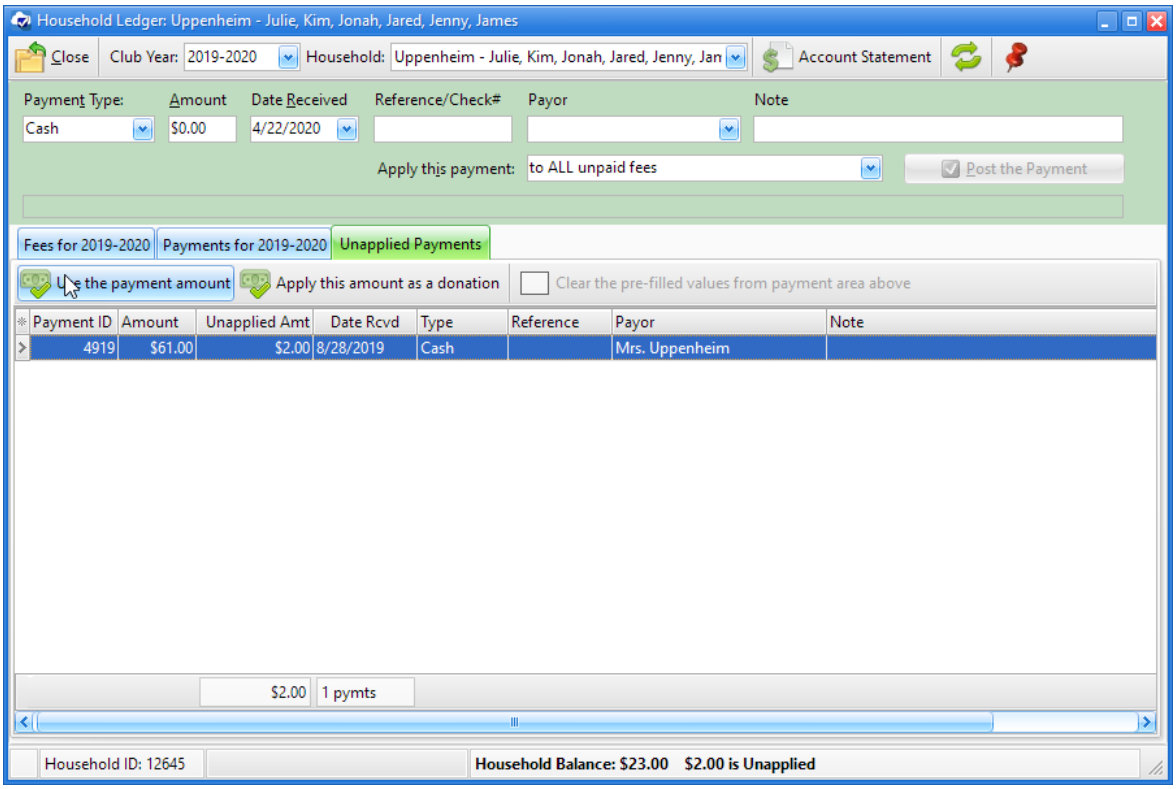
3. Click **Post the Payment**. The **Total Paid** and **Balance** at the bottom of the Fees grid are adjusted. The payment is added to the **Payments** grid. An unapplied payment is added to the **Unapplied Payment** grid for any money remaining.

Payments Toolbar:

Icon	Action	Description
	Save	Saves changes made to payment details. The following payment details can be edited directly in the grid: **Date Rcvd, [Payment] Type**, **Reference**, **Payor**, **Note**
	Delete Payment	Removes the selected payment(s). A confirmation is required.
	Unapply Payment	Removes the association(s) of the payment to all fees.
	Unapply Payment on selected Fee	Enabled if a single fee is selected. Removes the association of the payment to only the selected fee instead of all of the fees.

Unapplied Payments

The **Unapplied Payments** tab displays any payments (or parts of payments) not applied to a specific fee. This could occur if a member pays more than the fee amount or pays for future fees.



To apply an unapplied payment to an existing fee:

1. Select the unapplied payment to be applied.

2. Click **Use the payment amount**. The payment information is entered in the top portion of the window. Continue as explained for Posting a Payment. When the payment is posted, the **Total Paid** and **Balance** are adjusted on the **Fees** grid, the Unapplied amount is adjusted on the **Payments** grid and the unapplied payment is removed from the **Unapplied Payments** grid.

   To cancel the use of the payment, select **Clear the pre-filled values from payment area above**.

To apply this amount as a donation:

1. Select the unapplied payment to be used as a donation.
2. Click **Apply this amount as a donation**. A confirmation dialog will be shown. Read the details and click **Yes** to continue or **No** to cancel. A fee record with an Item Number of "Donation" will be created. The amount of the unapplied payment will be applied to this new fee record.

   An inventory record must exist with the item number "Donation".

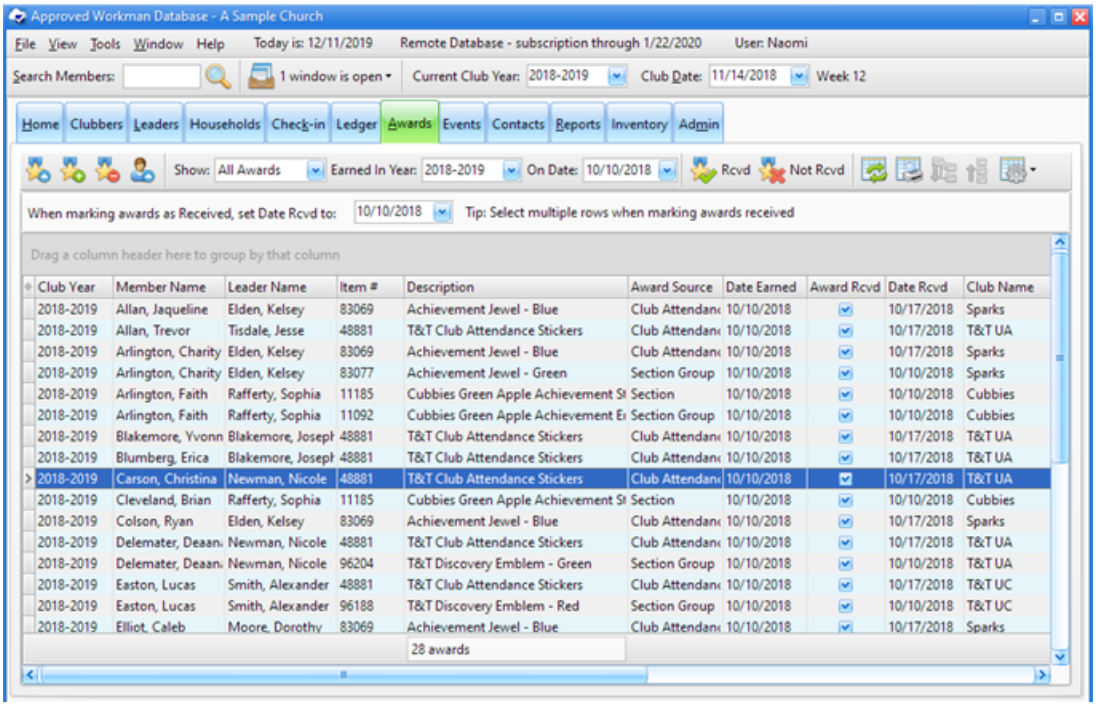
Chapter 13

13 The Awards Module

The Awards Module provides a big picture view of awards earned by all members. The default view limits the records displayed to those earned on the Current Club Date. A different club date can be selected or choose "All Dates". New award records can be created from here, but manually creating awards is not generally necessary since awards are generated automatically during recordkeeping.

If the default for the Awards Message Dialog is set to the award is not received, then after handing out the awards, multi-select records in the Awards Module grid and click the **Rcvd** button.

While the Awards list is convenient for on-screen viewing, a more formal Awards report can be generated from the Reports Module for a Director or Commander to use when presenting awards.



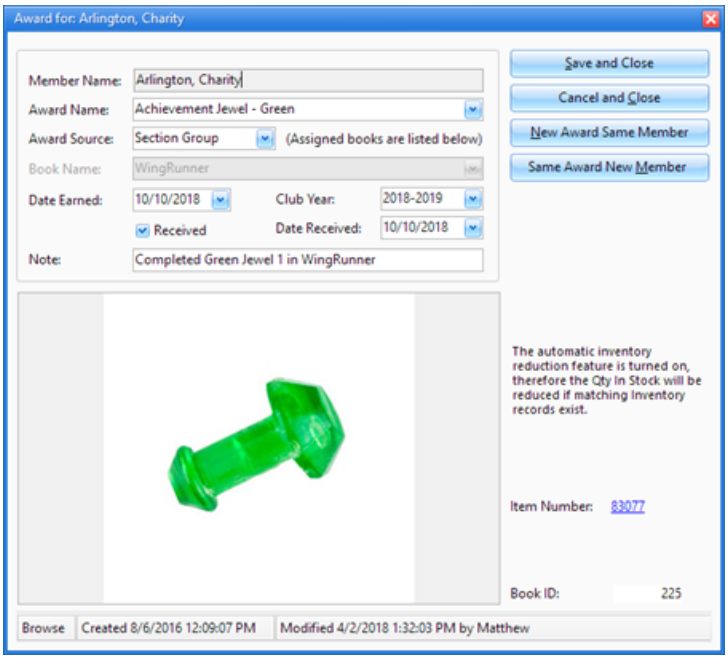
Icon	Action	Description
	Open Award	Opens the selected award in the Award dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the award.)
	New Award (Ctrl-N)	Opens the Award dialog with blank/default values to create a new award.
	Delete Award(s) (Ctrl-D)	Removes the selected award(s).

	Open Member	Opens the member record for the person who earned the selected award.
	Show	Filters the data in the grid. Choose to show **All Awards**, **Not Received** or **Received** awards. **Earned in Year** limits records to awards earned in the selected club year.
	Rcvd	Marks the selected award(s) as having been received by the member. When marking awards **Received**, set **Date Rcvd to:** defaults to the current club date. When working with awards received on a different date, change the date before clicking the **Rcvd** button.
	Not Rcvd	Marks the selected award(s) as *not* being received by the member yet.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

13.1 The Award Dialog

Opening or creating an award opens the Award dialog to view, modify, or enter details of an award.

Most awards are triggered and created automatically so do not need to be manually entered. This is especially true for Cubbies, Sparks, and T&T. Trek and Journey generally have book-level awards triggered, along with cumulative book awards such as Excellence, Timothy, Citation, etc. However, other awards can be added using the Award dialog.



- **Member Name** - person who earned the award
- **Award Name** -selection includes items marked to be used in Award lists in the Inventory record. If an image exists, it is shown in the area below. The Item Number is displayed to the right of the image.

  If the correct award is not available in the drop-down list, open the award item from the Inventory Module and click on the **Club Usage** tab. Select **Use this item as a choice in any AWARD related drop-down list**.

- **Award Source** - what caused the award to be earned: **Achievement, Book, Church Attendance, Club Attendance, Donation, Event, Other, Section, Section Group, Service, Training**.
- **Book Name** - enabled when the **Award Source** is set to **Book**, to indicate the relevant book for the award
- **Date Earned** - defaults to the current club date but can be changed
- **Club Year** - filled in automatically. Verify that it is correct or make changes if needed.
- **Received** - if **Yes** is selected, the **Date Received** field is enabled
- **Note** - any additional information related to the award

Action Buttons

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Award Same Member** - saves the award then selects the same **Member Name** and resets the other fields to blank to begin entering another award.

  This is especially useful when entering historical records when getting started.

- **Same Award New Member -** saves the award and leaves all of the award information the same except for the **Member Name** which is left blank. Select the **Member Name** and edit any of the other fields as needed.

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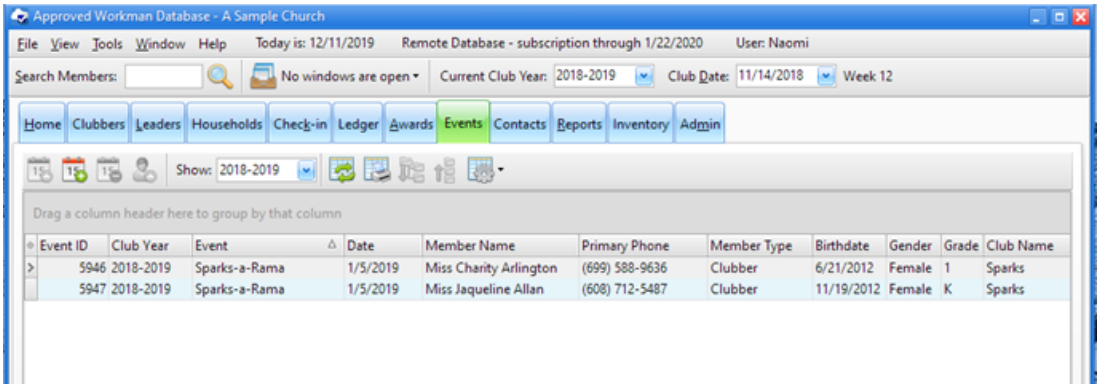
Chapter 14

14 The Events Module

The Events Module tracks participation in events. Add, delete, view, or modify records. Some popular events are provided by default. Customize additional event names under **Admin > Generic Lookups > Events.** Associate awards with events under **Admin > Awards > Event Awards**.



Icon	Action	Description
	Open Event	Opens the selected event in the Event dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the event.)
	New Event (Ctrl-N)	Opens the Event dialog with blank/default values to create a new event.
	Delete Event(s) (Ctrl-D)	Removes the selected event(s).
	Open Member	Opens the member record for the person who participated in the selected event.
	Show	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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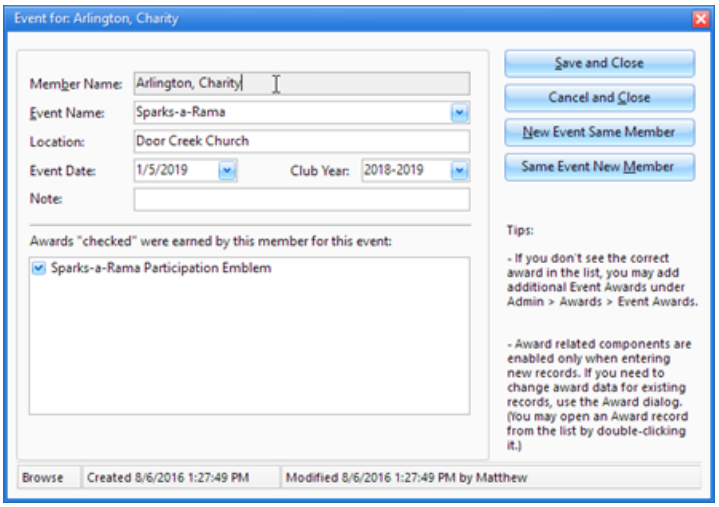
14.1 The Event Dialog

Opening or creating an event opens the Event dialog to view, modify, or enter details of an event.



- **Member Name** - person who participated in the event
- **Event Name** - selection options are determined by **Admin > Generic Lookups** > **Events**
- **Location** - where the event took place
- **Event Date** - date the event took place
- **Club Year** - filled in automatically. Verify that it is correct or make changes if needed.
- **Note** - any additional information related to the event

Awards

When creating a new event, if an award was earned, indicate the following:

- **Awards earned by this member for this event** - selection options are determined by **Admin > Awards > Event Awards**.
- **Award Received:** selecting **Yes** enables the **Date Received**.

For existing event records, use the Awards Module to add an event award or edit the event award.

Action Buttons

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Event Same Member** - saves the event then selects the same **Member Name** and shows any previous event awards earned by the member to begin entering another event.
- **Same Event New Member** - saves the event and leaves all event information the same, except for the **Member Name**, which is left blank. Select the **Member Name** and edit as needed.

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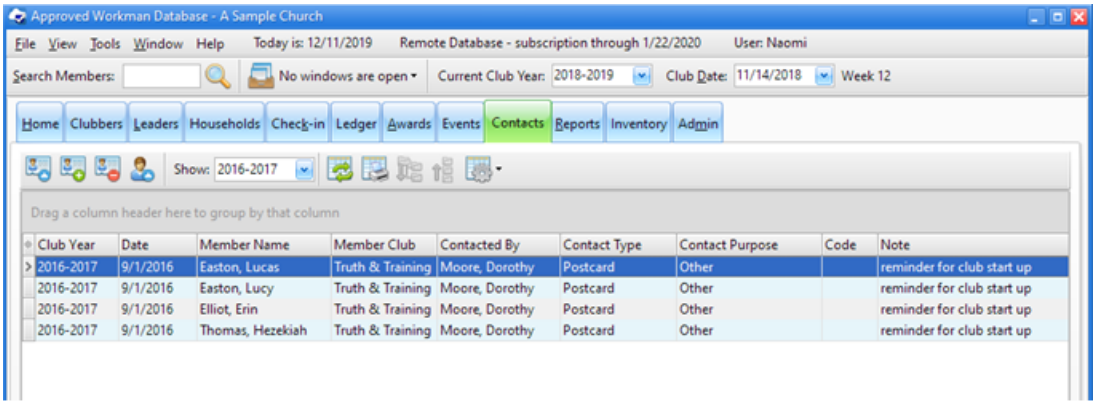
Chapter 15

15 The Contacts Module

Sometimes leaders contact clubbers outside of regular club time, such as making a home visit, a phone call, or sending a "Get Well" card to a sick clubber. The Contacts Module tracks all these contacts.



Icon	Action	Description
	Open Contact	Opens the selected contact in the Contact dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the contact.)
	New Contact (Ctrl-N)	Opens the Contact dialog with blank/default values to create a new contact.
	Delete Contact(s) (Ctrl-D)	Removes the selected contact(s).
	Open Member	Opens the member record for the person who was contacted in the selected record.
	Show	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

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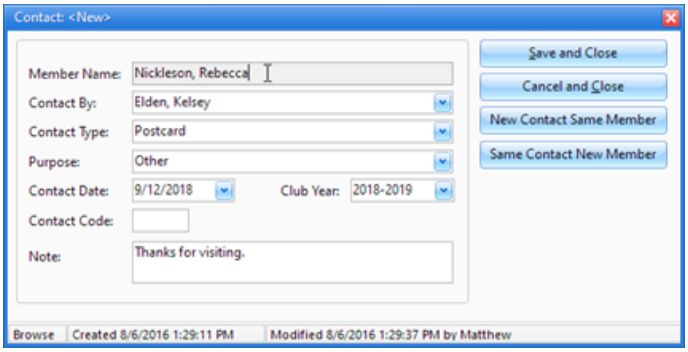
15.1 The Contact Dialog

Opening or creating a contact opens the Contact dialog to view, modify, or enter details of a contact.



- **Member Name -** person who was contacted
- **Contact By** - person who made the contact
- **Contact Type -** selection options are determined by **Admin > Generic Lookups** > **Contact Types**
- **Purpose** - selection options are determined by **Admin > Generic Lookups** > **Contact Purposes**
- **Contact Date -** defaults to the current date but can be changed
- **Club Year -** filled in automatically. Verify that it is correct or make changes if needed.
- **Contact Code -** a short "tag" to identify particular records as needed. This Code column can be made visible in the main Contact list grid.
- **Note -** any additional information relevant to the contact

Actions

- **Save and Close** - saves the record and closes the dialog.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Contact Same Member -** saves the contact then selects the same **Member Name** to begin entering another contact.
- **Same Contact New Member -** saves the contact and leaves all of the contact information the same, except for the **Member Name**, which is left blank. Select the **Member Name** and edit any of the fields as needed.

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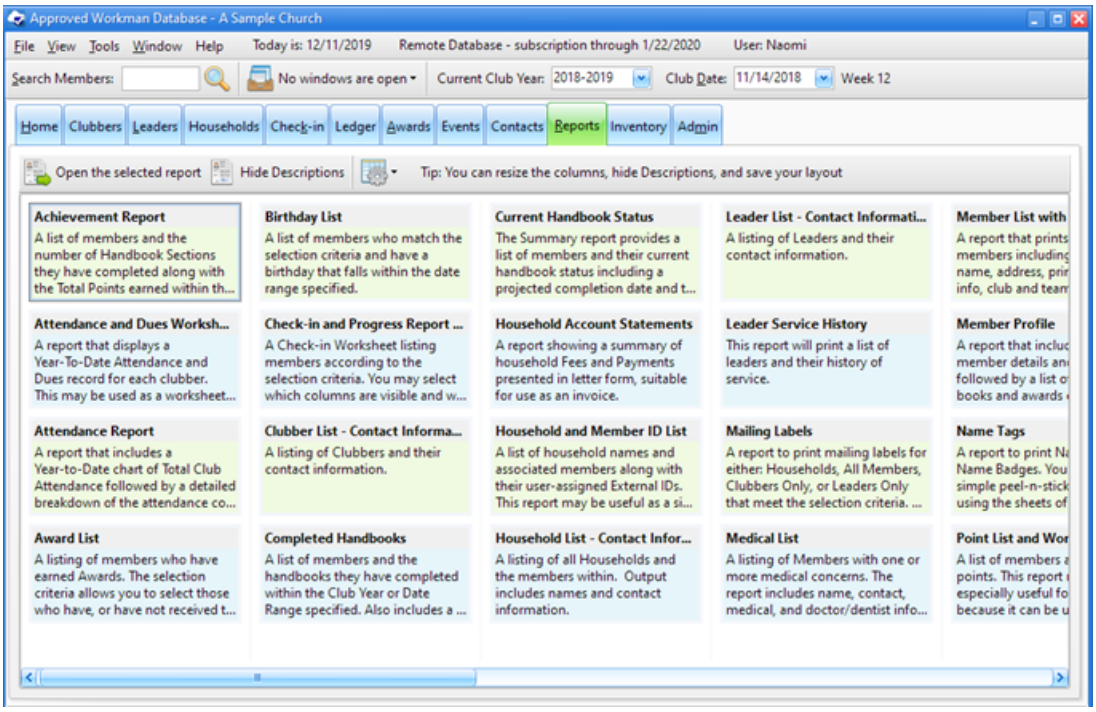
Chapter 16

16 The Reports Module

The Reports Module provides access to predefined formal reports that can be generated for leaders, club directors, commanders, and pastors. Although the options for each report are slightly different, the steps for generating them are basically the same. This chapter provides basic instructions. Experimentation with the options is the best way to learn how to maximize the information from the reports.

1. Click on the **Reports** tab in the Main Window to display the report titles in alphabetical order along with detailed descriptions of each report.



If the descriptions are no longer needed, click the **Hide Descriptions** button. The size of the columns can also be adjusted. Use the Grid menu to **Save the Current Grid Layout**.

2. Click **Open the Selected Report** on the toolbar or double click a report name to open the Report Dialog.

The Report Dialog along with examples of each generated report are shown in the following sections. Each report type has different options that are applicable for running that report. The options used in the dialog are saved when the dialog closes and are reloaded the next time it is opened.

3. Set the **Selection Criteria -** options for what groups to include in the report. This varies by report, but many include: **Club Name**, **Team Name**, **Member Type**, and **Member Status**. For some reports, the selection criteria includes a **Date Range**.

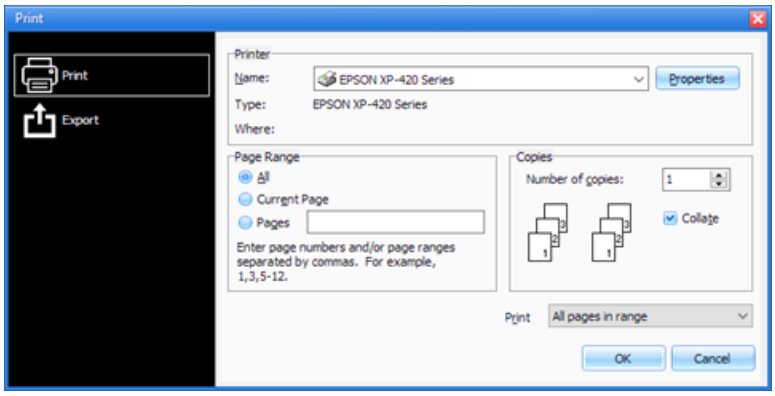
4. Select **Grouping and/or Sorting Options** - many reports provide radio buttons on the right to indicate how results should be grouped and/or sorted.

5. Choose **Additional Options** - some reports have additional unique options. For example, several reports allow for shaded rows, and provide a color selection option for selecting the shading color.

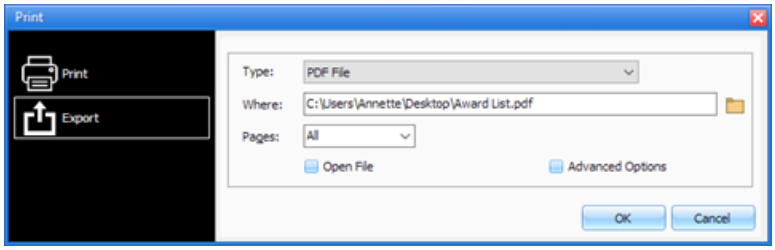
6. Click **Preview** - displays the report results to ensure that the desired dataset is generated.

The **Preview** and **Print** buttons are disabled until necessary options are chosen.

7. Click **Print** - opens a Print dialog with options to **Print** or **Export**.



- Select which printer to use, which pages to print and the number of copies.
- When the Printer settings are complete, click **OK**.



- Select the file type, location to save the file, and which pages to print.
- Click **OK** to export the data.

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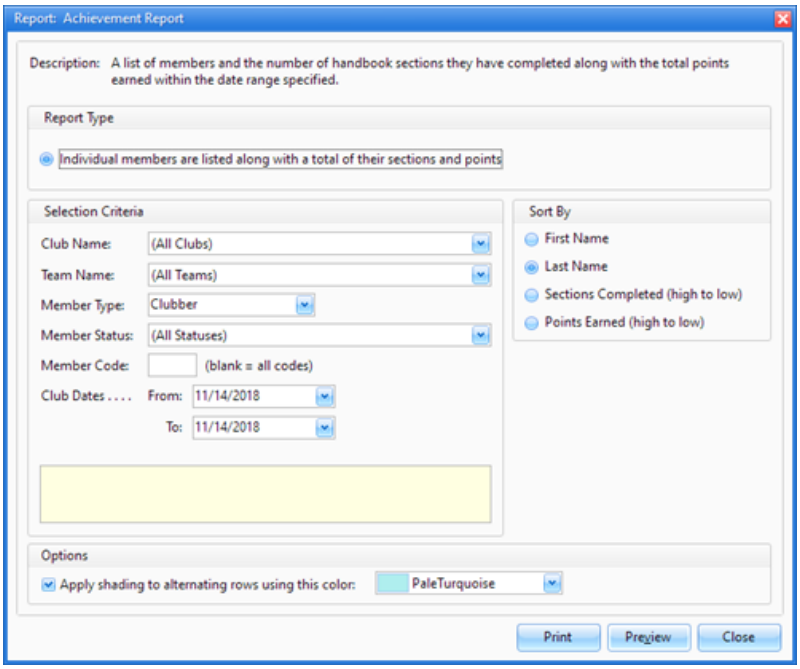
16.1 Achievement Report

This report provides information on number of completed sections and points earned (for both required and extra credit sections) within a specified date range. There are three types of achievement reports:

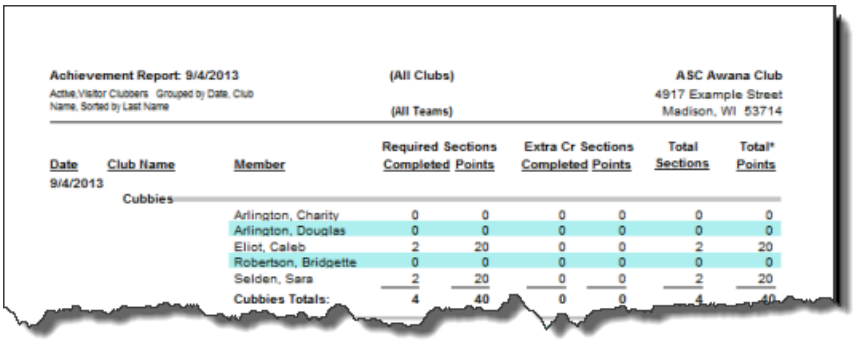
1. Individual members are listed for each club date within the range specified. [Currently not available.]
2. Individual members are listed only once along with their grand total of sections and points.
3. Individual members are not listed, only the bottom line totals for each group are shown. [Currently not available.]

Report Dialog



Example Output

Report Type # 1



Achievement Report: 9/4/2013 (All Clubs) ASC Awana Club
Active,Visitor Clubbers Grouped by Date, Club Name, Sorted by Last Name (All Teams) 4917 Example Street Madison, WI 53714

Date	Club Name	Member	Required Sections Completed	Required Sections Points	Extra Cr Sections Completed	Extra Cr Sections Points	Total Sections	Total* Points
9/4/2013	Cubbies							
		Arlington, Charity	0	0	0	0	0	0
		Arlington, Douglas	0	0	0	0	0	0
		Eliot, Caleb	2	20	0	0	2	20
		Robertson, Bridgette	0	0	0	0	0	0
		Selden, Sara	2	20	0	0	2	20
		Cubbies Totals:	4	40	0	0	4	40

Report Type # 2

Achievement Report: 9/4/2013 (All Clubs) **ASC Awana Club**
Active,Visitor Clubbers Sorted by Last Name 4917 Example Street
(All Teams) Madison, WI 53714

Summary

Member	Required Sections Completed	Required Sections Points	Extra Cr Sections Completed	Extra Cr Sections Points	Total Sections	Total* Points
Alen, Dorothy	6	60	0	0	6	80
Alen, Mikayla	0	0	0	0	0	0
Allan, Jaqueline	6	60	0	0	6	70
Allan, Trevor	0	0	0	0	0	20
Arlington, Charity	0	0	0	0	0	0
Arlington, Douglas	0	0	0	0	0	0
Brackenheimer, Kevin	0	0	0	0	0	0
Bunker, Samantha	0	0	0	0	0	0
Carson, Ben	0	0	0	0	0	20
Clark, [illegible]	0	0	0	0	[illegible]	[illegible]

Report Type # 3

Achievement Report: 9/4/2013 (All Clubs) **ASC Awana Club**
Active,Visitor Clubbers 4917 Example Street
(All Teams) Madison, WI 53714

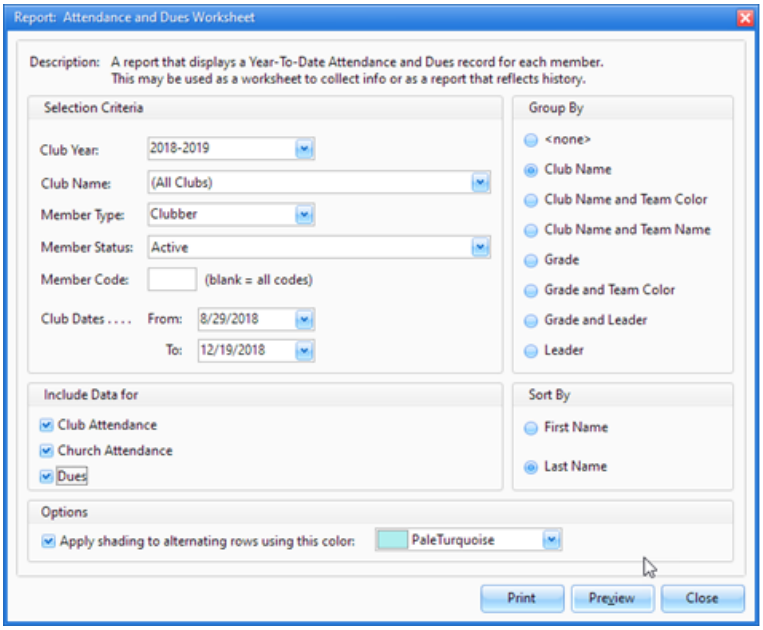
Summary

Date		Required Sections Completed	Required Sections Points	Extra Cr Sections Completed	Extra Cr Sections Points	Total Sections	Total* Points
9/4/2013							
	Cubbies Totals:	4	40	0	0	4	40
	Journey Totals:	0	0	0	0	0	10
	Puggles Totals:	0	0	0	0	0	0
	Sparks boys Totals:	0	0	0	0	0	20
	Sparks girls Totals:	18	180	0	0	18	220
	T&T Adventure Totals:	4	40	0	0	4	70
	T&T Challenge Totals:	0	0	0	0	0	40
	Trek Totals:	0	0	0	0	0	60
	Club Date Totals:	26	260	0	0	26	460
	Report Totals:	26	260	0	[illegible]	[illegible]	[illegible]

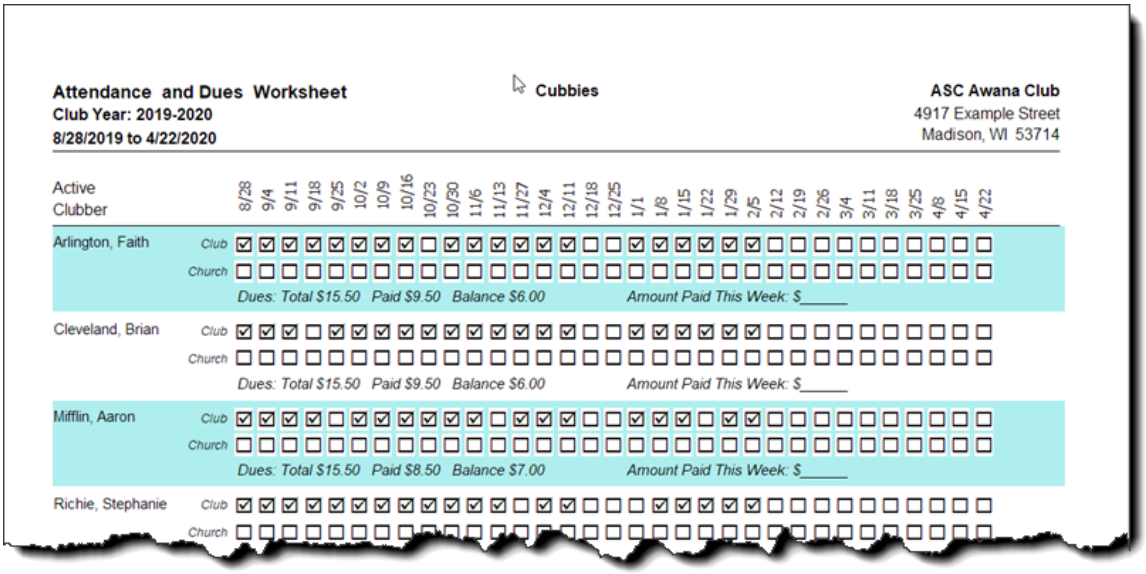
16.2 Attendance and Dues Worksheet

This report uses check boxes to show Club and/or Church Attendance. Information about Dues payments can also be included. It can be used as a worksheet to collect information or a report to reflect history.

Report Dialog



Example Output



Attendance and Dues Worksheet
Club Year: 2019-2020
8/28/2019 to 4/22/2020

Cubbies

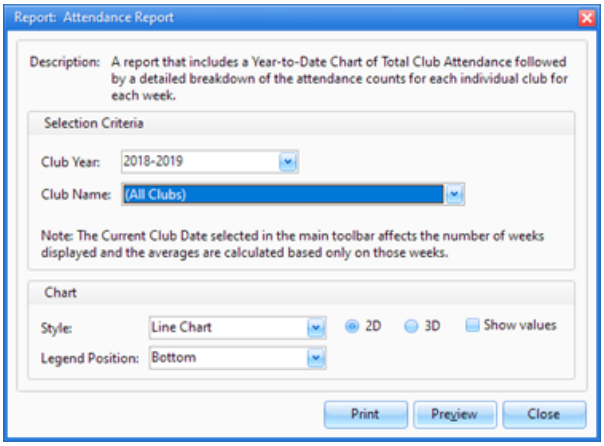
ASC Awana Club
4917 Example Street
Madison, WI 53714

Active Clubber		8/28	9/4	9/11	9/18	9/25	10/2	10/9	10/16	10/23	10/30	11/6	11/13	11/27	12/4	12/11	12/18	12/25	1/1	1/8	1/15	1/22	1/29	2/5	2/12	2/19	2/26	3/4	3/11	3/18	3/25	4/8	4/15	4/22
Arlington, Faith	Club	☑	☑	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Church	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Dues: Total $15.50 Paid $9.50 Balance $6.00																		*Amount Paid This Week: $_____*															
Cleveland, Brian	Club	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐	☐	☑	☑	☑	☑	☑	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Church	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Dues: Total $15.50 Paid $9.50 Balance $6.00																		*Amount Paid This Week: $_____*															
Mifflin, Aaron	Club	☑	☑	☑	☑	☐	☑	☑	☑	☑	☑	☑	☐	☑	☑	☑	☐	☐	☑	☑	☑	☐	☑	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Church	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Dues: Total $15.50 Paid $8.50 Balance $7.00																		*Amount Paid This Week: $_____*															
Richie, Stephanie	Club	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☐	☑	☑	☐	☐	☐	☑	☑	☑	☑	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
	Church	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

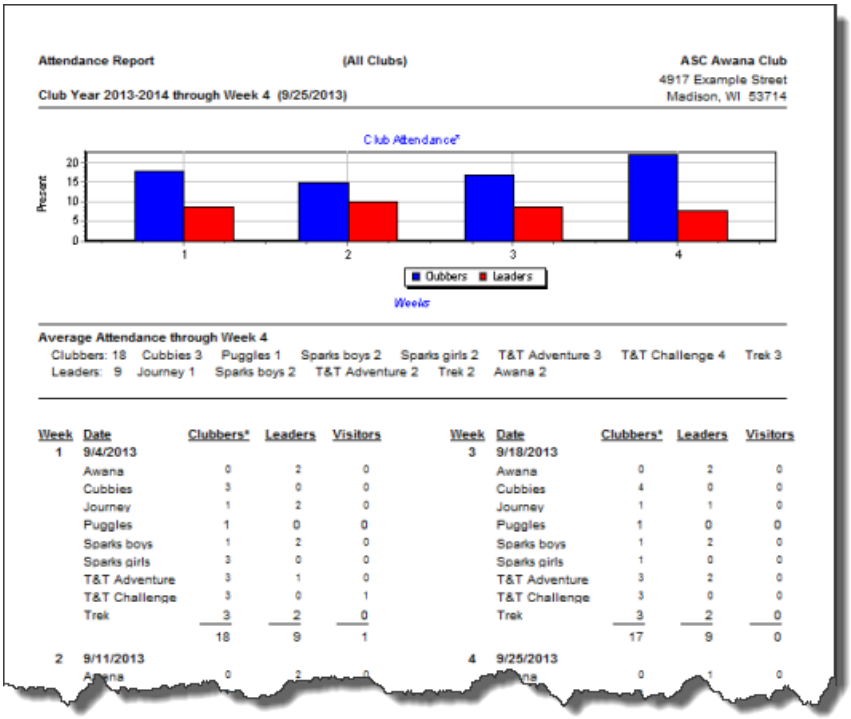
16.3 Attendance Report

This report shows a chart of Total Club Attendance (year-to-date) as well as a detailed breakdown of attendance counts (clubbers, leaders and visitors) by club for each week.

Report Dialog



Example Output



Attendance Report (All Clubs) ASC Awana Club
4917 Example Street
Club Year 2013-2014 through Week 4 (9/25/2013) Madison, WI 53714

Average Attendance through Week 4
Clubbers: 18 Cubbies 3 Puggles 1 Sparks boys 2 Sparks girls 2 T&T Adventure 3 T&T Challenge 4 Trek 3
Leaders: 9 Journey 1 Sparks boys 2 T&T Adventure 2 Trek 2 Awana 2

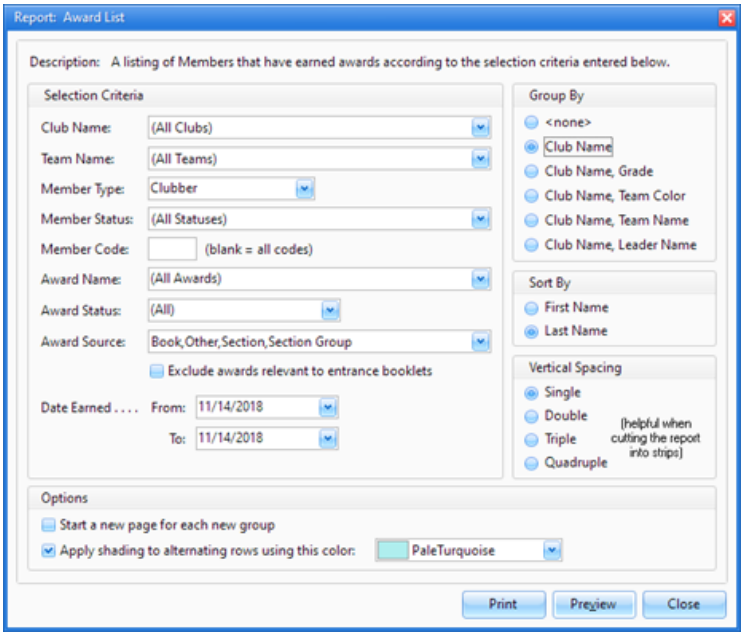
Week	Date	Clubbers*	Leaders	Visitors
1	9/4/2013			
	Awana	0	2	0
	Cubbies	3	0	0
	Journey	1	2	0
	Puggles	1	0	0
	Sparks boys	1	2	0
	Sparks girls	3	0	0
	T&T Adventure	3	1	0
	T&T Challenge	3	0	1
	Trek	3	2	0
		18	9	1
2	9/11/2013			
	Awana	0	2	0

Week	Date	Clubbers*	Leaders	Visitors
3	9/18/2013			
	Awana	0	2	0
	Cubbies	4	0	0
	Journey	1	1	0
	Puggles	1	0	0
	Sparks boys	1	2	0
	Sparks girls	1	0	0
	T&T Adventure	3	2	0
	T&T Challenge	3	0	0
	Trek	3	2	0
		17	9	0
4	9/25/2013			
	Awana	0	1	0

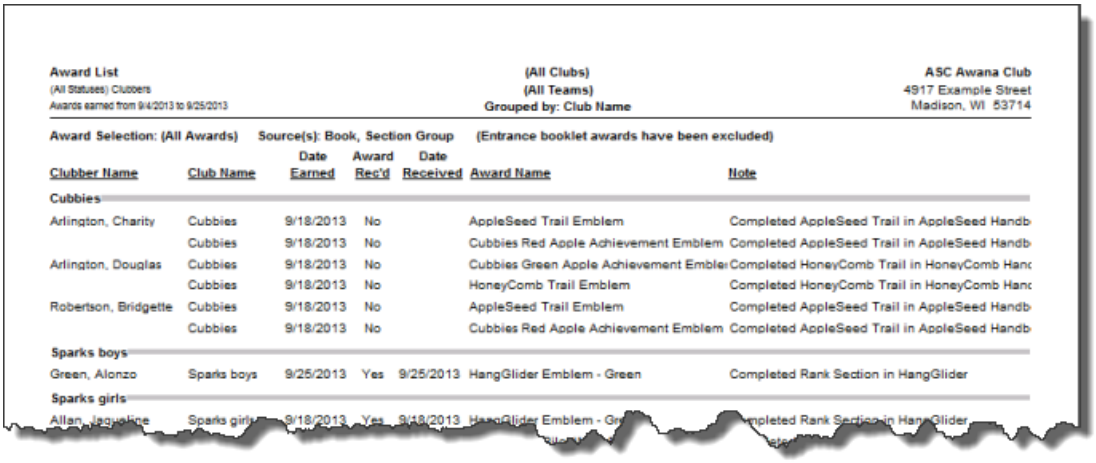
16.4 Award List

This report lists information related to awards earned by members such as award name, earned date, received status, and received date as well as a note explaining what was completed to earn the award.

Report Dialog



Example Output



Award List
(All Statuses) Clubbers
Awards earned from 9/4/2013 to 9/25/2013

(All Clubs)
(All Teams)
Grouped by: Club Name

ASC Awana Club
4917 Example Street
Madison, WI 53714

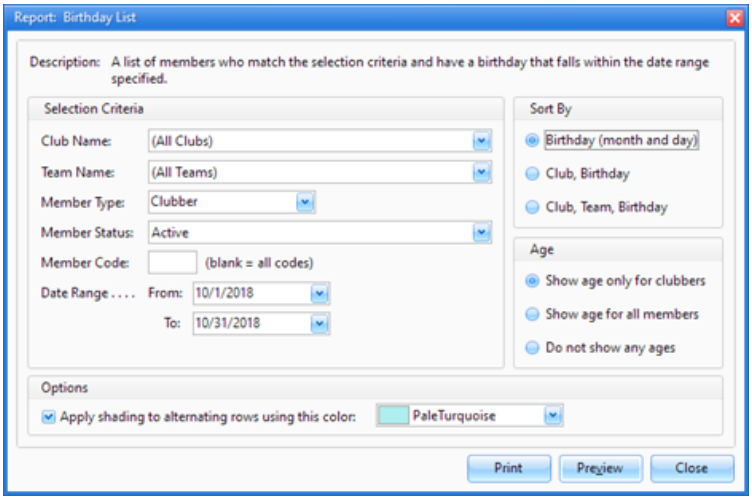
Award Selection: (All Awards) Source(s): Book, Section Group (Entrance booklet awards have been excluded)

Clubber Name	Club Name	Date Earned	Award Rec'd	Date Received	Award Name	Note
Cubbies						
Arlington, Charity	Cubbies	9/18/2013	No		AppleSeed Trail Emblem	Completed AppleSeed Trail in AppleSeed Handb
	Cubbies	9/18/2013	No		Cubbies Red Apple Achievement Emblem	Completed AppleSeed Trail in AppleSeed Handb
Arlington, Douglas	Cubbies	9/18/2013	No		Cubbies Green Apple Achievement Emble	Completed HoneyComb Trail in HoneyComb Hanc
	Cubbies	9/18/2013	No		HoneyComb Trail Emblem	Completed HoneyComb Trail in HoneyComb Hanc
Robertson, Bridgette	Cubbies	9/18/2013	No		AppleSeed Trail Emblem	Completed AppleSeed Trail in AppleSeed Handb
	Cubbies	9/18/2013	No		Cubbies Red Apple Achievement Emblem	Completed AppleSeed Trail in AppleSeed Handb
Sparks boys						
Green, Alonzo	Sparks boys	9/25/2013	Yes	9/25/2013	HangGlider Emblem - Green	Completed Rank Section in HangGlider
Sparks girls						
Allan, Jacqueline	Sparks girls	9/18/2013	Yes	9/18/2013	HangGlider Emblem - Gr	mpleted Rank Section in HangGlider

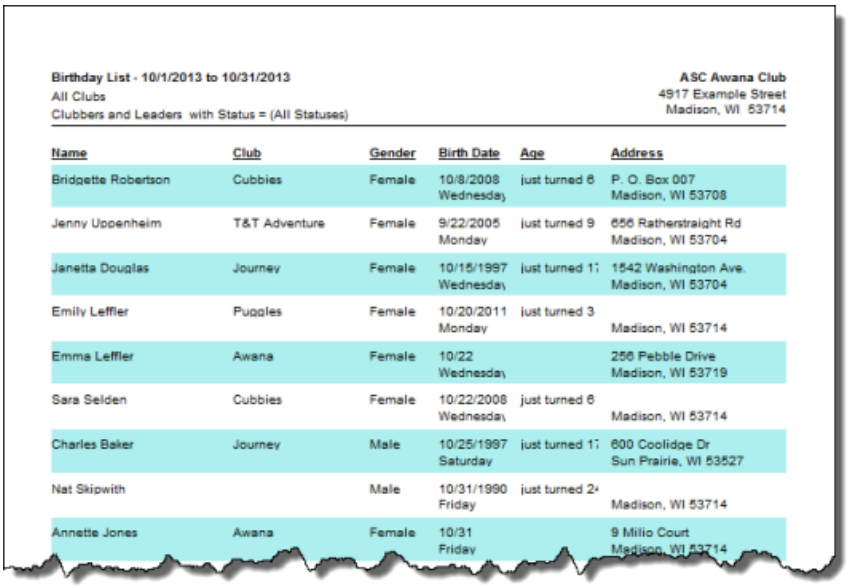
16.5 Birthday List

This report provides a list of members with birth dates in a selected range and includes the member's club, gender, birth date, age, and address.

Report Dialog



Example Output



Birthday List - 10/1/2013 to 10/31/2013
All Clubs
Clubbers and Leaders with Status = (All Statuses)

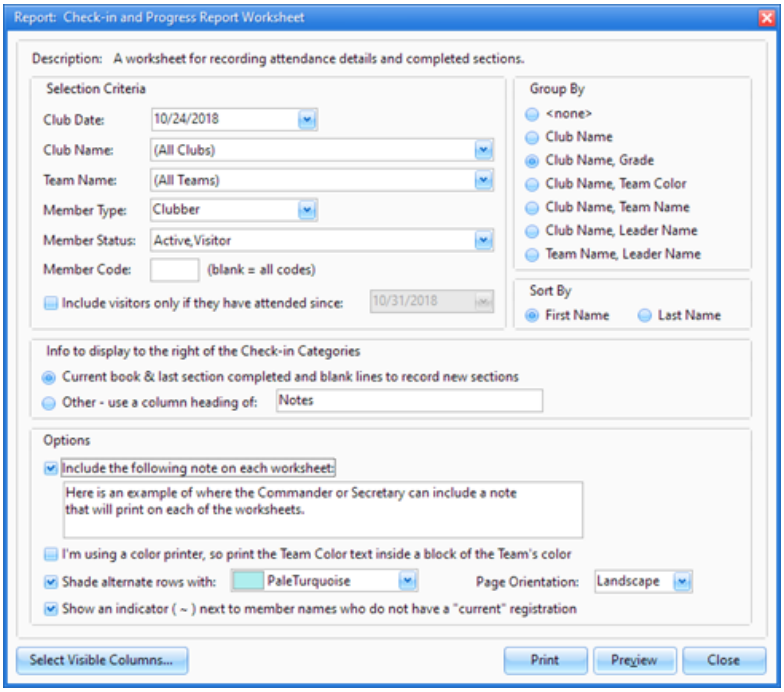
ASC Awana Club
4917 Example Street
Madison, WI 53714

Name	Club	Gender	Birth Date	Age	Address
Bridgette Robertson	Cubbies	Female	10/8/2008 Wednesday	just turned 6	P. O. Box 007 Madison, WI 53708
Jenny Uppenheim	T&T Adventure	Female	9/22/2005 Monday	just turned 9	656 Ratherstraight Rd Madison, WI 53704
Janetta Douglas	Journey	Female	10/15/1997 Wednesday	just turned 1	1542 Washington Ave. Madison, WI 53704
Emily Leffler	Puggles	Female	10/20/2011 Monday	just turned 3	Madison, WI 53714
Emma Leffler	Awana	Female	10/22 Wednesday		256 Pebble Drive Madison, WI 53719
Sara Selden	Cubbies	Female	10/22/2008 Wednesday	just turned 6	Madison, WI 53714
Charles Baker	Journey	Male	10/25/1997 Saturday	just turned 1	600 Coolidge Dr Sun Prairie, WI 53527
Nat Skipwith		Male	10/31/1990 Friday	just turned 2	Madison, WI 53714
Annette Jones	Awana	Female	10/31 Friday		9 Milio Court Madison, WI 53714

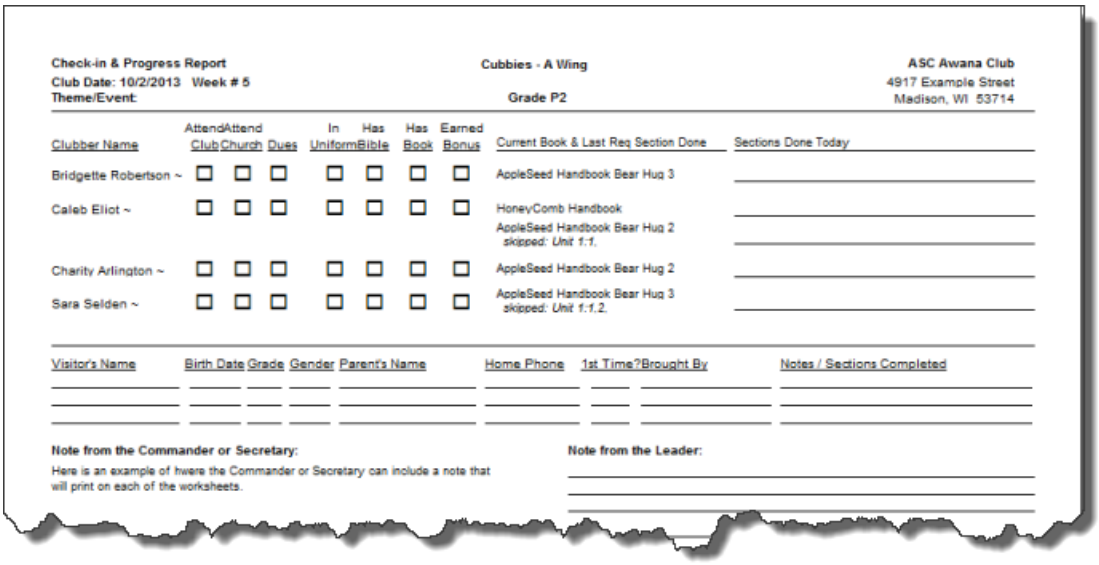
16.6 Check-in and Progress Report Worksheet

This report produces a customizable worksheet for recording attendance and check-in information as well as completed sections.

Report Dialog



Example Output



Check-in & Progress Report
Club Date: 10/2/2013 Week # 5
Theme/Event:

Cubbies - A Wing
Grade P2

ASC Awana Club
4917 Example Street
Madison, WI 53714

Clubber Name	Attend Club	Attend Church	Dues	In Uniform	Has Bible	Has Book	Earned Bonus	Current Book & Last Req Section Done	Sections Done Today
Bridgette Robertson ~	☐	☐	☐	☐	☐	☐	☐	AppleSeed Handbook Bear Hug 3	
Caleb Eliot ~	☐	☐	☐	☐	☐	☐	☐	HoneyComb Handbook AppleSeed Handbook Bear Hug 2 *skipped: Unit 1:1.*	
Charity Arlington ~	☐	☐	☐	☐	☐	☐	☐	AppleSeed Handbook Bear Hug 2	
Sara Selden ~	☐	☐	☐	☐	☐	☐	☐	AppleSeed Handbook Bear Hug 3 *skipped: Unit 1:1.2.*	

Visitor's Name	Birth Date	Grade	Gender	Parent's Name	Home Phone	1st Time?	Brought By	Notes / Sections Completed

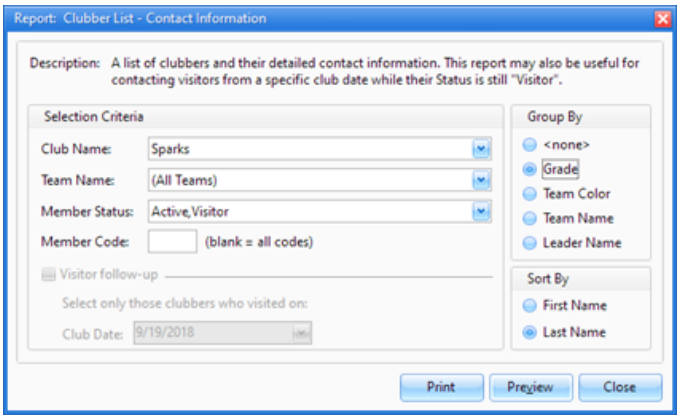
Note from the Commander or Secretary:
Here is an example of where the Commander or Secretary can include a note that will print on each of the worksheets.

Note from the Leader:

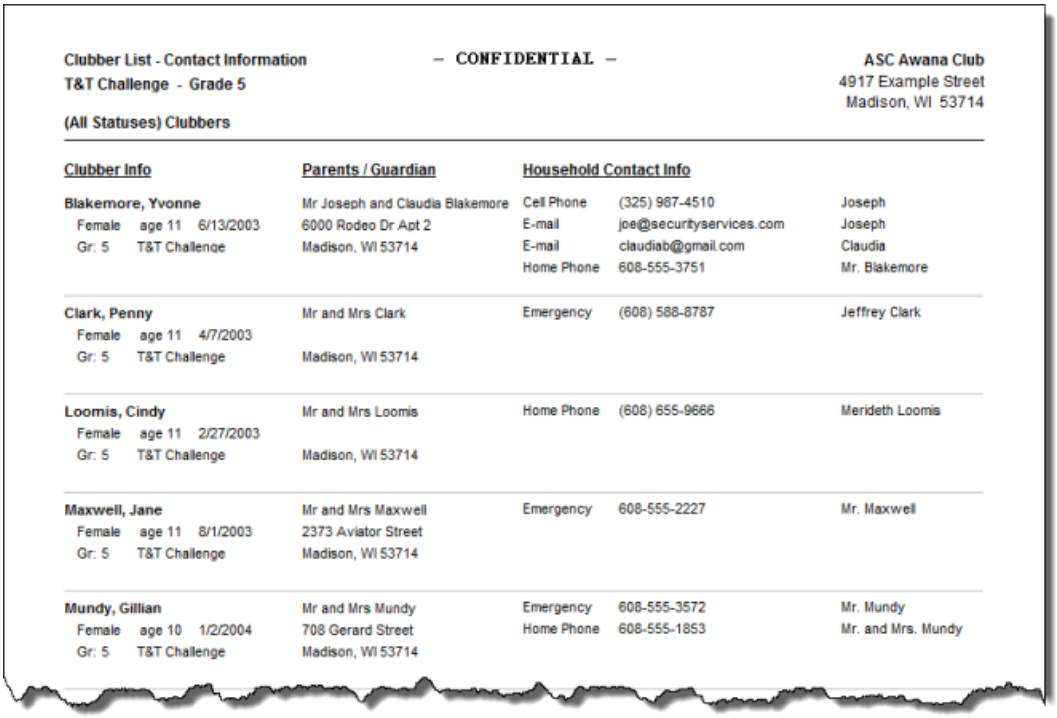
16.7 Clubber List - Contact Information

This report provides detailed contact information for clubbers including Clubber Information, Parents/ Guardian Information and Household Contact Information. It can also be used to get contact information for visitors from a specific club date while the Member Status is still set to "Visitor".

Report Dialog



Example Output



Clubber List - Contact Information — CONFIDENTIAL —

T&T Challenge - Grade 5

(All Statuses) Clubbers

ASC Awana Club
4917 Example Street
Madison, WI 53714

Clubber Info	Parents / Guardian	Household Contact Info		
Blakemore, Yvonne Female age 11 6/13/2003 Gr: 5 T&T Challenge	Mr Joseph and Claudia Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714	Cell Phone E-mail E-mail Home Phone	(325) 987-4510 joe@securityservices.com claudiab@gmail.com 608-555-3751	Joseph Joseph Claudia Mr. Blakemore
Clark, Penny Female age 11 4/7/2003 Gr: 5 T&T Challenge	Mr and Mrs Clark Madison, WI 53714	Emergency	(608) 588-8787	Jeffrey Clark
Loomis, Cindy Female age 11 2/27/2003 Gr: 5 T&T Challenge	Mr and Mrs Loomis Madison, WI 53714	Home Phone	(608) 655-9666	Merideth Loomis
Maxwell, Jane Female age 11 8/1/2003 Gr: 5 T&T Challenge	Mr and Mrs Maxwell 2373 Aviator Street Madison, WI 53714	Emergency	608-555-2227	Mr. Maxwell
Mundy, Gillian Female age 10 1/2/2004 Gr: 5 T&T Challenge	Mr and Mrs Mundy 708 Gerard Street Madison, WI 53714	Emergency Home Phone	608-555-3572 608-555-1853	Mr. Mundy Mr. and Mrs. Mundy

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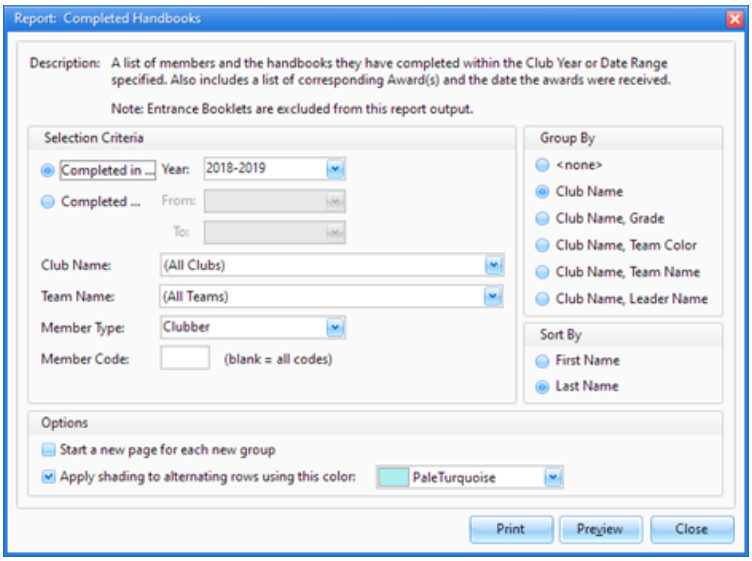
16.8 Completed Handbooks

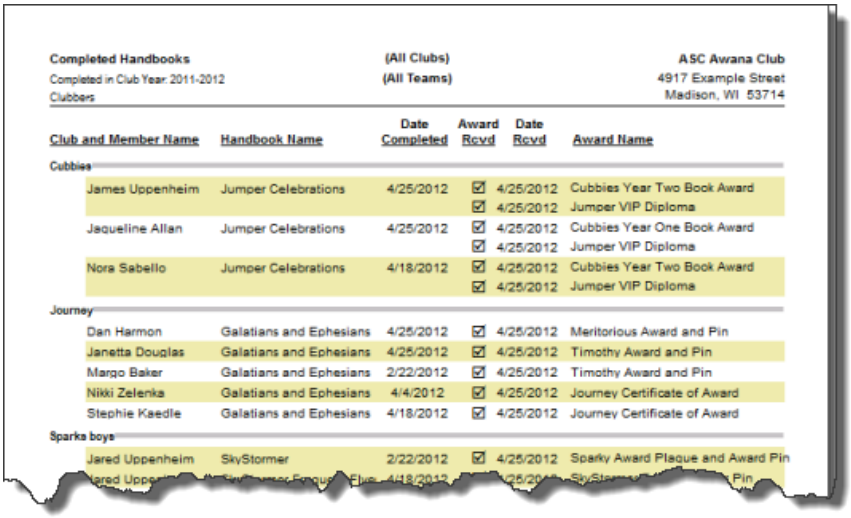
This report lists active members who have completed handbooks within the club year or date range specified. It also includes information pertaining to any corresponding awards.

Entrance Booklets are excluded from the report output.

Report Dialog



Example Output



Completed Handbooks
Completed in Club Year 2011-2012
Clubbers

(All Clubs)
(All Teams)

ASC Awana Club
4917 Example Street
Madison, WI 53714

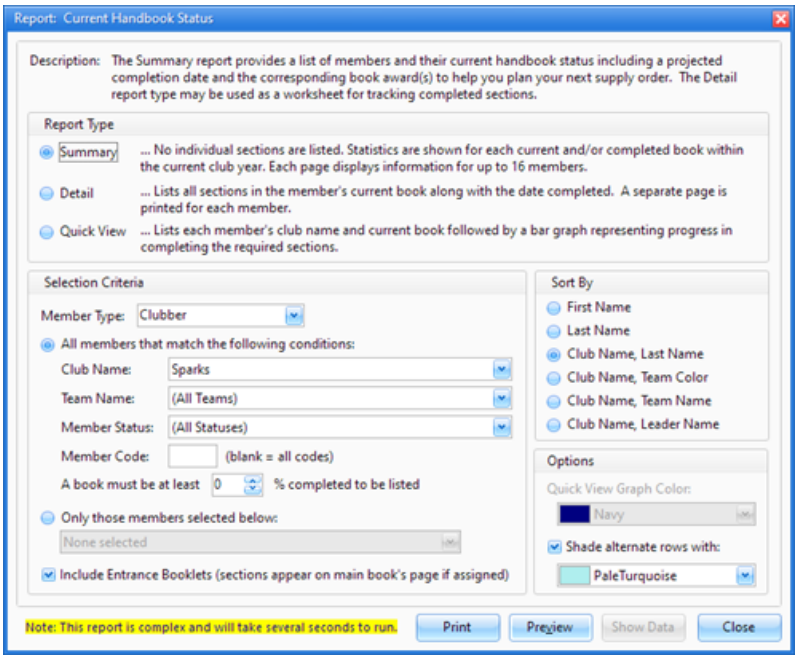
Club and Member Name	Handbook Name	Date Completed	Award Rcvd	Date Rcvd	Award Name
Cubbies					
James Uppenheim	Jumper Celebrations	4/25/2012	☑	4/25/2012	Cubbies Year Two Book Award
			☑	4/25/2012	Jumper VIP Diploma
Jaqueline Allan	Jumper Celebrations	4/25/2012	☑	4/25/2012	Cubbies Year One Book Award
			☑	4/25/2012	Jumper VIP Diploma
Nora Sabello	Jumper Celebrations	4/18/2012	☑	4/25/2012	Cubbies Year Two Book Award
			☑	4/25/2012	Jumper VIP Diploma
Journey					
Dan Harmon	Galatians and Ephesians	4/25/2012	☑	4/25/2012	Meritorious Award and Pin
Janetta Douglas	Galatians and Ephesians	4/25/2012	☑	4/25/2012	Timothy Award and Pin
Margo Baker	Galatians and Ephesians	2/22/2012	☑	4/25/2012	Timothy Award and Pin
Nikki Zelenka	Galatians and Ephesians	4/4/2012	☑	4/25/2012	Journey Certificate of Award
Stephie Kaedle	Galatians and Ephesians	4/18/2012	☑	4/25/2012	Journey Certificate of Award
Sparks boys					
Jared Uppenheim	SkyStormer	2/22/2012	☑	4/25/2012	Sparky Award Plaque and Award Pin

16.9 Current Handbook Status

This report provides a way of evaluating progress in currently assigned handbooks. There are three types of Handbook Status reports available:

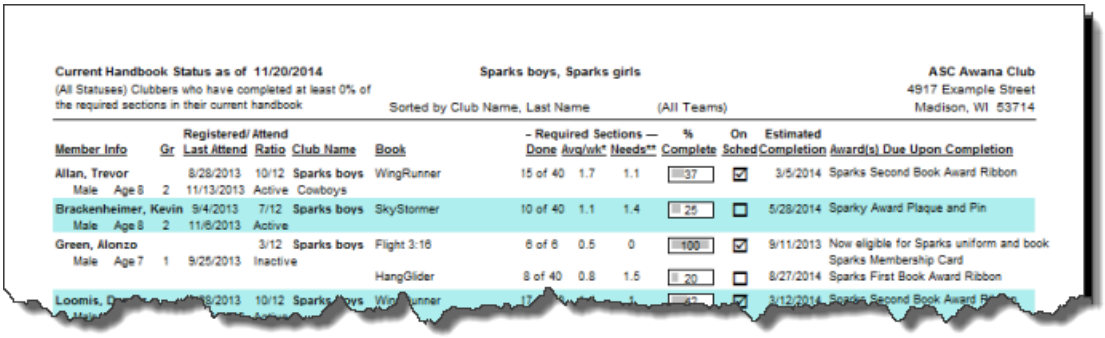
1. **Summary -** No individual sections are listed. Statistics such as Required Sections Complete and Average per Week are shown for each current book. Estimated completion dates and awards due upon completion are also given to assist in year end planning and ordering supplies.
2. **Detail -** Lists all sections in the member's current handbook along with the date completed. A separate page is printed for each member. This can be used as a report or a worksheet.
3. **Quick View -** shows each member's club and current book followed by a bar graph representing progress in completing the required sections.

Report Dialog



Example Output

Report Type: Summary



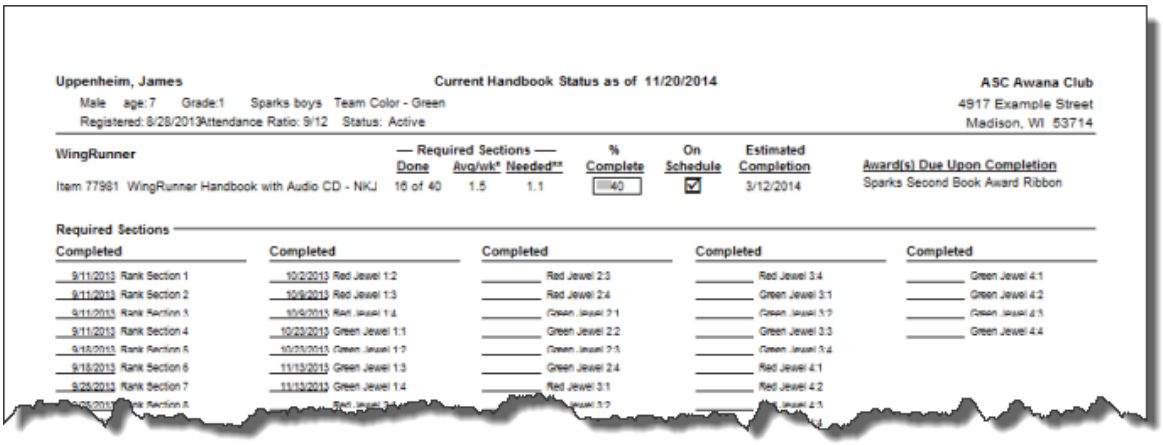
Current Handbook Status as of 11/20/2014
(All Statuses) Clubbers who have completed at least 0% of the required sections in their current handbook

Sparks boys, Sparks girls
Sorted by Club Name, Last Name (All Teams)

ASC Awana Club
4917 Example Street
Madison, WI 53714

Member Info	Gr	Registered/ Last Attend	Attend Ratio	Club Name	Book	Required Sections Done	Avg/wk*	Needs**	% Complete	On Sched	Estimated Completion	Award(s) Due Upon Completion
Allan, Trevor		8/28/2013	10/12	Sparks boys	WingRunner	15 of 40	1.7	1.1	37	☑	3/5/2014	Sparks Second Book Award Ribbon
Male Age 8	2	11/13/2013	Active	Cowboys								
Brackenheimer, Kevin		9/4/2013	7/12	Sparks boys	SkyStormer	10 of 40	1.1	1.4	25	☐	5/28/2014	Sparky Award Plaque and Pin
Male Age 8	2	11/6/2013	Active									
Green, Alonzo			3/12	Sparks boys	Flight 3:16	6 of 6	0.5	0	100	☑	9/11/2013	Now eligible for Sparks uniform and book Sparks Membership Card
Male Age 7	1	9/25/2013	Inactive									
					HangGlider	8 of 40	0.8	1.5	20	☐	8/27/2014	Sparks First Book Award Ribbon
Loomis, [illegible]		[illegible]	10/12	Sparks boys	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	☑	3/12/2014	Sparks Second Book Award [illegible]

Report Type: Detail



Uppenheim, James — Current Handbook Status as of 11/20/2014 — ASC Awana Club
Male age:7 Grade:1 Sparks boys Team Color - Green — 4917 Example Street
Registered: 8/28/2013 Attendance Ratio: 9/12 Status: Active — Madison, WI 53714

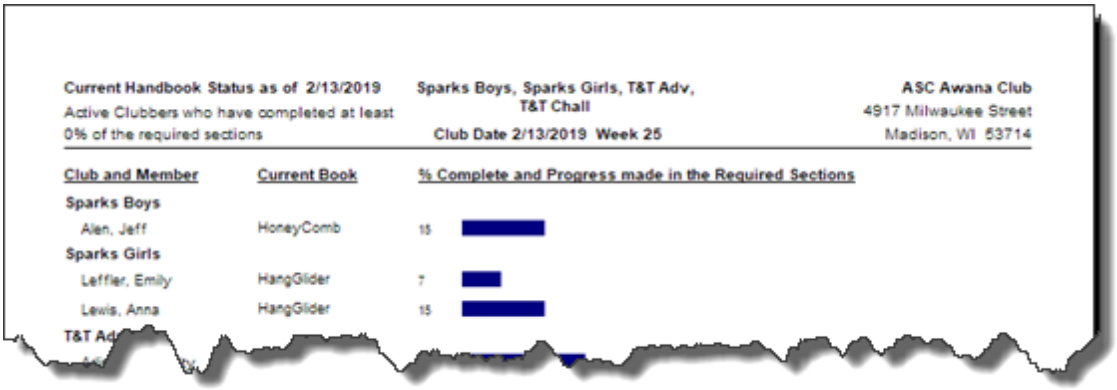
WingRunner

	— Required Sections — Done	Avg/wk*	Needed**	% Complete	On Schedule	Estimated Completion	Award(s) Due Upon Completion
Item 77981 WingRunner Handbook with Audio CD - NKJ	16 of 40	1.5	1.1	40	☑	3/12/2014	Sparks Second Book Award Ribbon

Required Sections

Completed	Completed	Completed	Completed	Completed
9/11/2013 Rank Section 1	10/2/2013 Red Jewel 1:2	Red Jewel 2:3	Red Jewel 3:4	Green Jewel 4:1
9/11/2013 Rank Section 2	10/9/2013 Red Jewel 1:3	Red Jewel 2:4	Green Jewel 3:1	Green Jewel 4:2
9/11/2013 Rank Section 3	10/9/2013 Red Jewel 1:4	Green Jewel 2:1	Green Jewel 3:2	Green Jewel 4:3
9/11/2013 Rank Section 4	10/23/2013 Green Jewel 1:1	Green Jewel 2:2	Green Jewel 3:3	Green Jewel 4:4
9/18/2013 Rank Section 5	10/23/2013 Green Jewel 1:2	Green Jewel 2:3	Green Jewel 3:4	
9/18/2013 Rank Section 6	11/13/2013 Green Jewel 1:3	Green Jewel 2:4	Red Jewel 4:1	
9/25/2013 Rank Section 7	11/13/2013 Green Jewel 1:4	Red Jewel 3:1	Red Jewel 4:2	
9/25/2013 Rank Section 8	Red Jewel 3:2		Red Jewel 4:3	

Report Type: Quick View



Current Handbook Status as of 2/13/2019 — Sparks Boys, Sparks Girls, T&T Adv, T&T Chall — ASC Awana Club
Active Clubbers who have completed at least — 4917 Milwaukee Street
0% of the required sections — Club Date 2/13/2019 Week 25 — Madison, WI 53714

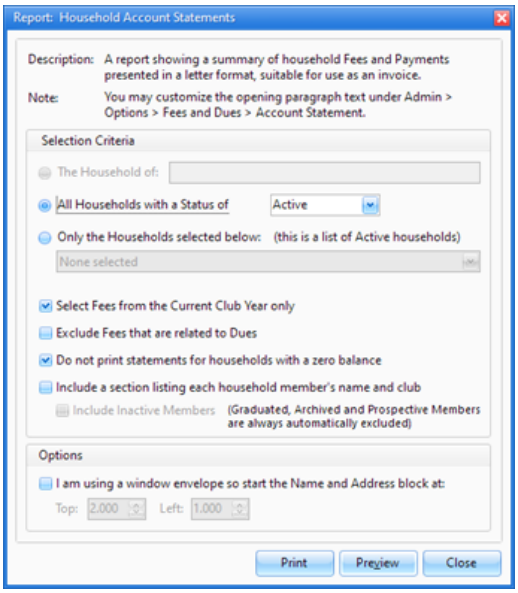
Club and Member	Current Book	% Complete and Progress made in the Required Sections
Sparks Boys		
Alen, Jeff	HoneyComb	15
Sparks Girls		
Leffler, Emily	HangGlider	7
Lewis, Anna	HangGlider	15
T&T Ad		

16.10 Household Account Statements

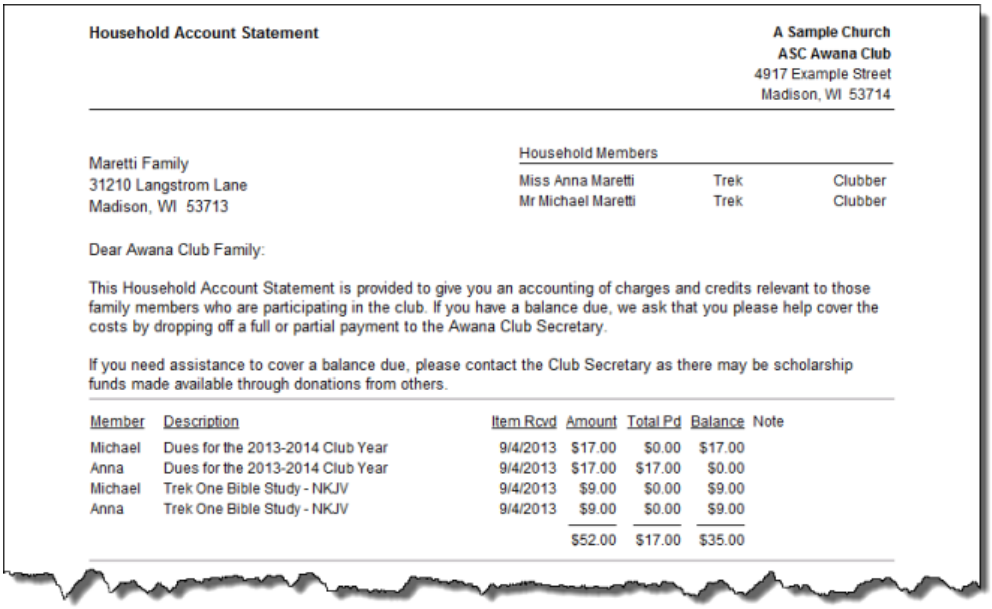
This report provides a summary of household Fees and Payments suitable to use as an invoice.

Customize the opening paragraph text under **Admin > Options > Fees and Dues > Account Statement**.

Report Dialog



Example Output



Household Account Statement

A Sample Church
ASC Awana Club
4917 Example Street
Madison, WI 53714

Maretti Family
31210 Langstrom Lane
Madison, WI 53713

Household Members

Miss Anna Maretti	Trek	Clubber
Mr Michael Maretti	Trek	Clubber

Dear Awana Club Family:

This Household Account Statement is provided to give you an accounting of charges and credits relevant to those family members who are participating in the club. If you have a balance due, we ask that you please help cover the costs by dropping off a full or partial payment to the Awana Club Secretary.

If you need assistance to cover a balance due, please contact the Club Secretary as there may be scholarship funds made available through donations from others.

Member	Description	Item Rcvd	Amount	Total Pd	Balance	Note
Michael	Dues for the 2013-2014 Club Year	9/4/2013	$17.00	$0.00	$17.00	
Anna	Dues for the 2013-2014 Club Year	9/4/2013	$17.00	$17.00	$0.00	
Michael	Trek One Bible Study - NKJV	9/4/2013	$9.00	$0.00	$9.00	
Anna	Trek One Bible Study - NKJV	9/4/2013	$9.00	$0.00	$9.00	
			$52.00	$17.00	$35.00	

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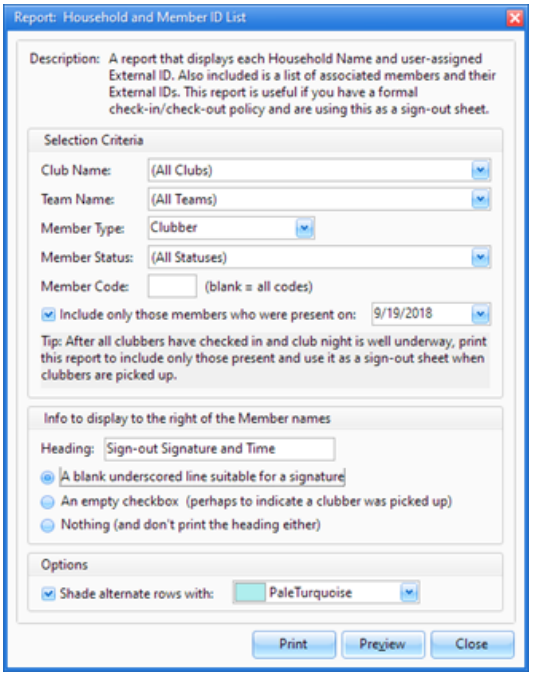
16.11 Household and Member ID List

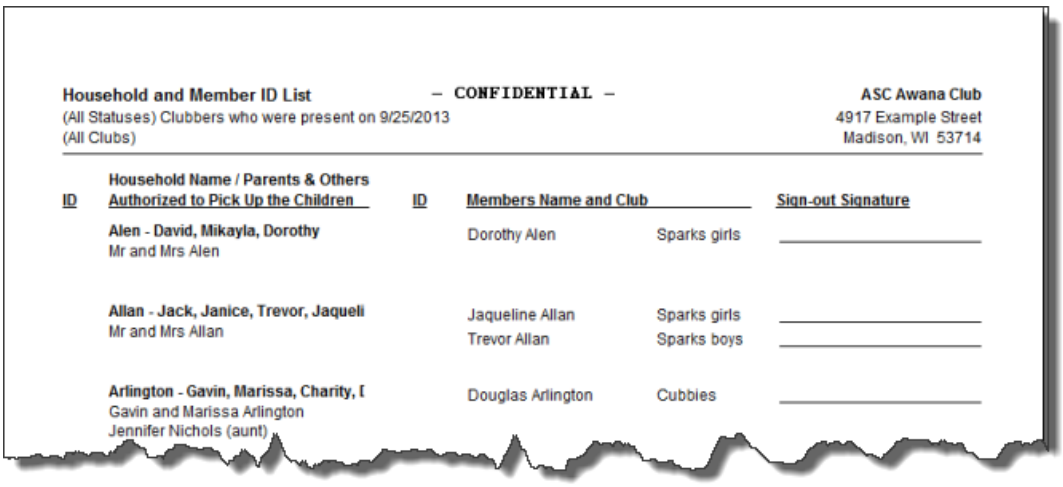
This report lists user-assigned External IDs and household names along with parents and others authorized to pick up clubbers. All Household members are listed. It can be used as a sign-out sheet.

To enter External IDs, under Admin > Options > Members, check the box to "Show the external ID fields on the Member form". The Member Window's Main tab will then display the external ID fields.

Report Dialog



Example Output



Household and Member ID List — CONFIDENTIAL —

(All Statuses) Clubbers who were present on 9/25/2013
(All Clubs)

ASC Awana Club
4917 Example Street
Madison, WI 53714

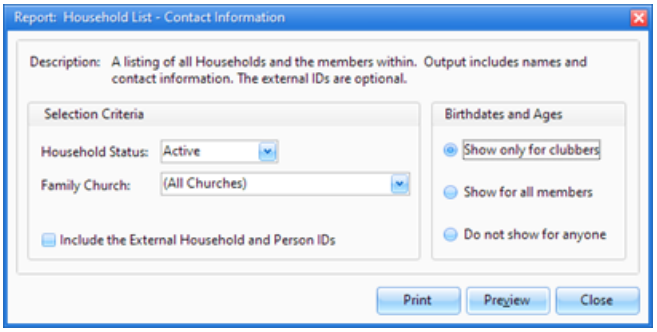
ID	Household Name / Parents & Others Authorized to Pick Up the Children	ID	Members Name and Club		Sign-out Signature
	Alen - David, Mikayla, Dorothy Mr and Mrs Alen		Dorothy Alen	Sparks girls	
	Allan - Jack, Janice, Trevor, Jaqueli Mr and Mrs Allan		Jaqueline Allan	Sparks girls	
			Trevor Allan	Sparks boys	
	Arlington - Gavin, Marissa, Charity, [Gavin and Marissa Arlington Jennifer Nichols (aunt)		Douglas Arlington	Cubbies	

16.12 Household List - Contact Information

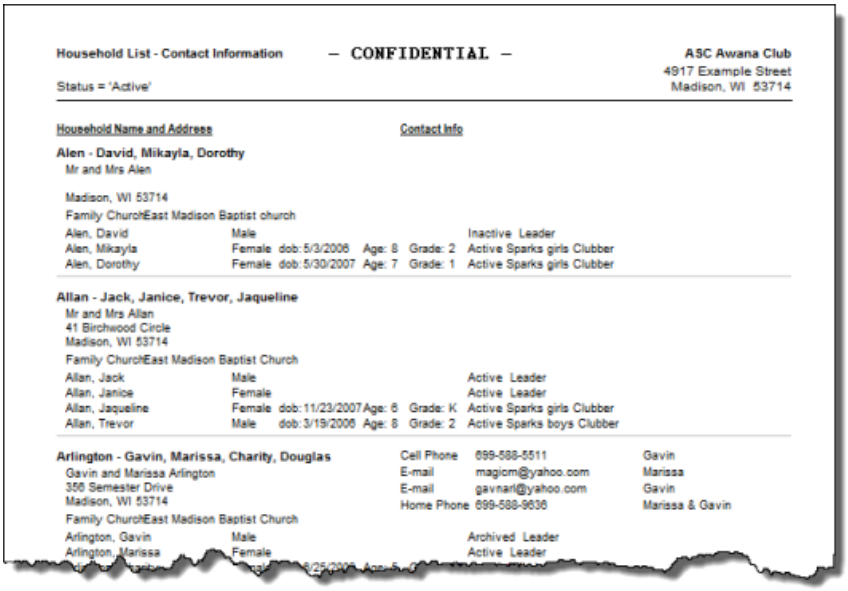
This report provides address and contact information for Households. It includes the Family Church and a list of all members in the Household. (External IDs can optionally be shown.)

The External IDs are optional fields on the Member Window's Main tab. To make them visible , go to Admin > Options > Members and check the box next to "Show the external ID fields on the Member form".

Report Dialog



Example Output



Household List - Contact Information — CONFIDENTIAL — ASC Awana Club
4917 Example Street
Madison, WI 53714
Status = 'Active'

Household Name and Address | Contact Info

Alen - David, Mikayla, Dorothy
Mr and Mrs Alen
Madison, WI 53714
Family ChurchEast Madison Baptist church

Alen, David	Male				Inactive Leader
Alen, Mikayla	Female	dob: 5/3/2006	Age: 8	Grade: 2	Active Sparks girls Clubber
Alen, Dorothy	Female	dob: 5/30/2007	Age: 7	Grade: 1	Active Sparks girls Clubber

Allan - Jack, Janice, Trevor, Jaqueline
Mr and Mrs Allan
41 Birchwood Circle
Madison, WI 53714
Family ChurchEast Madison Baptist Church

Allan, Jack	Male				Active Leader
Allan, Janice	Female				Active Leader
Allan, Jaqueline	Female	dob: 11/23/2007	Age: 6	Grade: K	Active Sparks girls Clubber
Allan, Trevor	Male	dob: 3/19/2006	Age: 8	Grade: 2	Active Sparks boys Clubber

Arlington - Gavin, Marissa, Charity, Douglas
Gavin and Marissa Arlington
356 Semester Drive
Madison, WI 53714
Family ChurchEast Madison Baptist Church

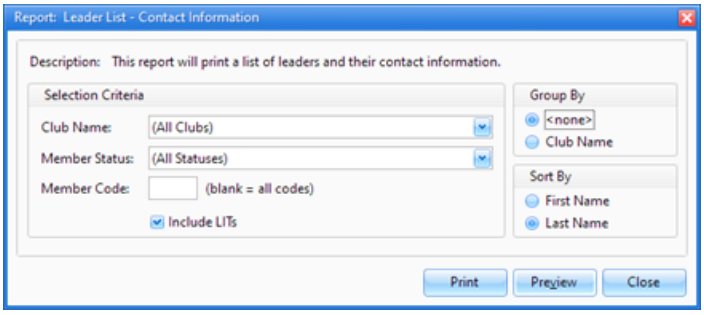
Cell Phone	699-588-5511	Gavin
E-mail	magicm@yahoo.com	Marissa
E-mail	gavnarl@yahoo.com	Gavin
Home Phone	699-588-9636	Marissa & Gavin

Arlington, Gavin	Male		Archived Leader
Arlington, Marissa	Female		Active Leader

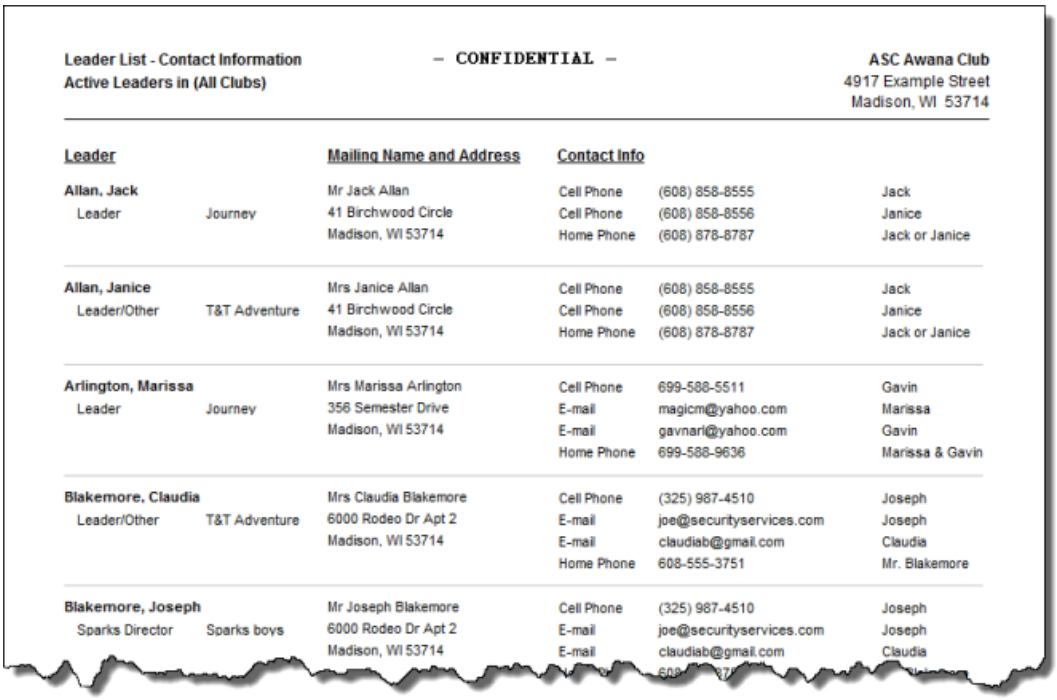
16.13 Leader List - Contact Information

This report provides detailed contact information for leaders including Mailing Name and Address as well as other (phone and e-mail) Contact Information.

Report Dialog



Example Output



Leader List - Contact Information
Active Leaders in (All Clubs)

– CONFIDENTIAL –

ASC Awana Club
4917 Example Street
Madison, WI 53714

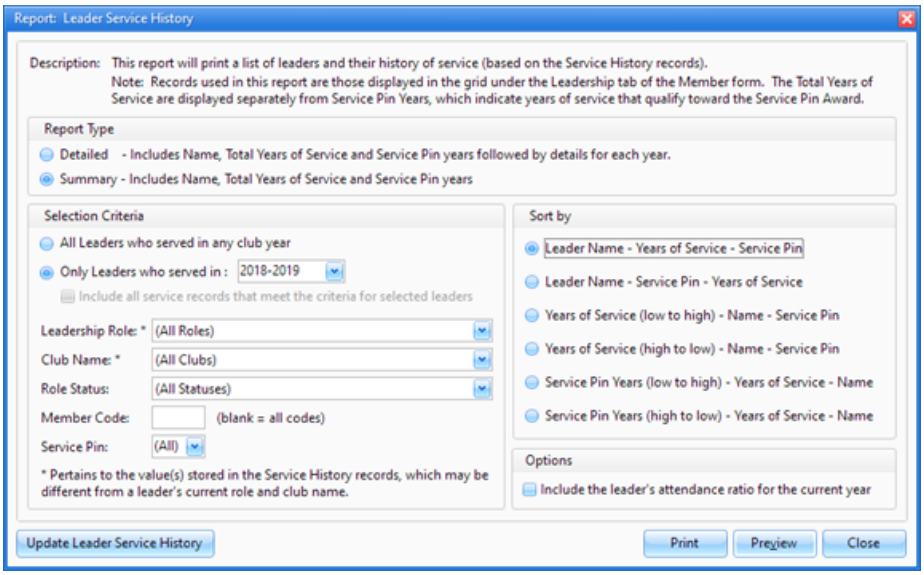
Leader		Mailing Name and Address	Contact Info		
Allan, Jack		Mr Jack Allan	Cell Phone	(608) 858-8555	Jack
Leader	Journey	41 Birchwood Circle	Cell Phone	(608) 858-8556	Janice
		Madison, WI 53714	Home Phone	(608) 878-8787	Jack or Janice
Allan, Janice		Mrs Janice Allan	Cell Phone	(608) 858-8555	Jack
Leader/Other	T&T Adventure	41 Birchwood Circle	Cell Phone	(608) 858-8556	Janice
		Madison, WI 53714	Home Phone	(608) 878-8787	Jack or Janice
Arlington, Marissa		Mrs Marissa Arlington	Cell Phone	699-588-5511	Gavin
Leader	Journey	356 Semester Drive	E-mail	magicm@yahoo.com	Marissa
		Madison, WI 53714	E-mail	gavnarl@yahoo.com	Gavin
			Home Phone	699-588-9636	Marissa & Gavin
Blakemore, Claudia		Mrs Claudia Blakemore	Cell Phone	(325) 987-4510	Joseph
Leader/Other	T&T Adventure	6000 Rodeo Dr Apt 2	E-mail	joe@securityservices.com	Joseph
		Madison, WI 53714	E-mail	claudiab@gmail.com	Claudia
			Home Phone	608-555-3751	Mr. Blakemore
Blakemore, Joseph		Mr Joseph Blakemore	Cell Phone	(325) 987-4510	Joseph
Sparks Director	Sparks boys	6000 Rodeo Dr Apt 2	E-mail	joe@securityservices.com	Joseph
		Madison, WI 53714	E-mail	claudiab@gmail.com	Claudia

16.14 Leader Service History

This report provides information pertaining to a leader's history of service. There are two types of Leader Service History reports available:

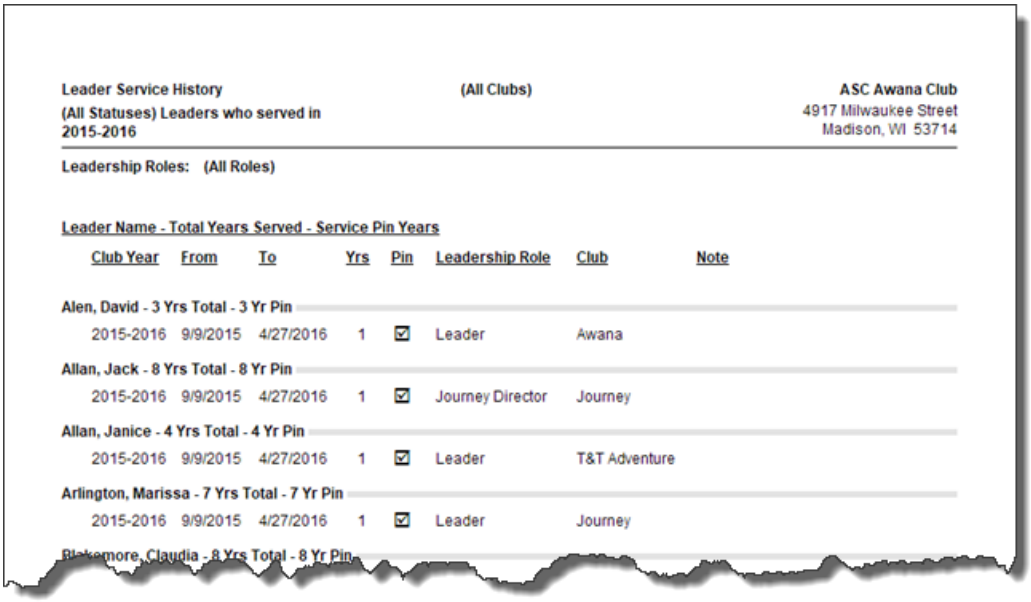
1. **Detailed -** Includes Name, Total Years of Service and Service Pin years with details for each year.
2. **Summary -** Includes Name, Total Years of Service and Service Pin years.

Report Dialog



Example Output

Report Type: Detailed



Leader Service History
(All Statuses) Leaders who served in 2015-2016

(All Clubs)

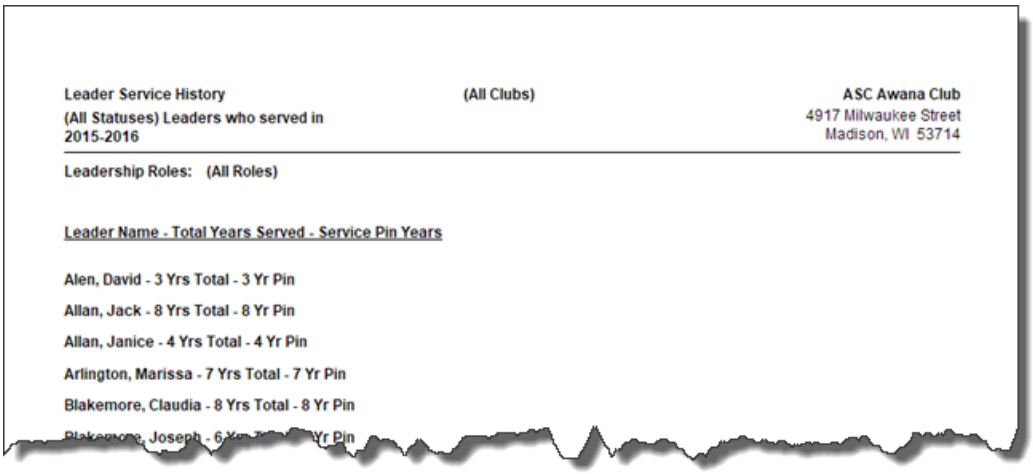
ASC Awana Club
4917 Milwaukee Street
Madison, WI 53714

Leadership Roles: (All Roles)

Leader Name - Total Years Served - Service Pin Years

Club Year	From	To	Yrs	Pin	Leadership Role	Club	Note
Alen, David - 3 Yrs Total - 3 Yr Pin							
2015-2016	9/9/2015	4/27/2016	1	☑	Leader	Awana	
Allan, Jack - 8 Yrs Total - 8 Yr Pin							
2015-2016	9/9/2015	4/27/2016	1	☑	Journey Director	Journey	
Allan, Janice - 4 Yrs Total - 4 Yr Pin							
2015-2016	9/9/2015	4/27/2016	1	☑	Leader	T&T Adventure	
Arlington, Marissa - 7 Yrs Total - 7 Yr Pin							
2015-2016	9/9/2015	4/27/2016	1	☑	Leader	Journey	
Blakemore, Claudia - 8 Yrs Total - 8 Yr Pin							

Report Type: Summary



Leader Service History (All Clubs) ASC Awana Club
(All Statuses) Leaders who served in 4917 Milwaukee Street
2015-2016 Madison, WI 53714

Leadership Roles: (All Roles)

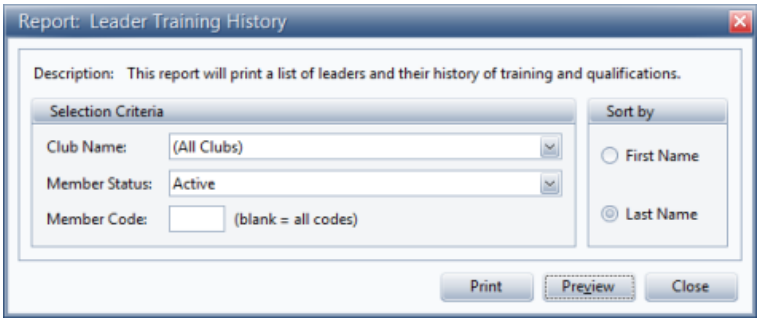
Leader Name - Total Years Served - Service Pin Years

Alen, David - 3 Yrs Total - 3 Yr Pin
Allan, Jack - 8 Yrs Total - 8 Yr Pin
Allan, Janice - 4 Yrs Total - 4 Yr Pin
Arlington, Marissa - 7 Yrs Total - 7 Yr Pin
Blakemore, Claudia - 8 Yrs Total - 8 Yr Pin
Blakemore, Joseph - 6 Yrs Total - 6 Yr Pin

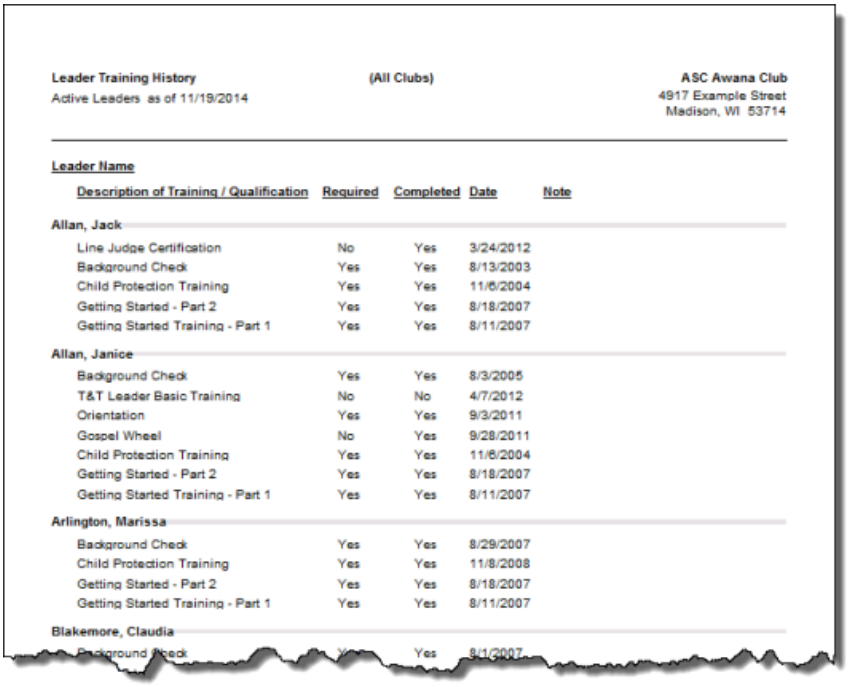
16.15 Leader Training History

This report provides information pertaining to a leader's training and qualifications including descriptions, completion status and dates. [Currently not available.]

Report Dialog



Example Output



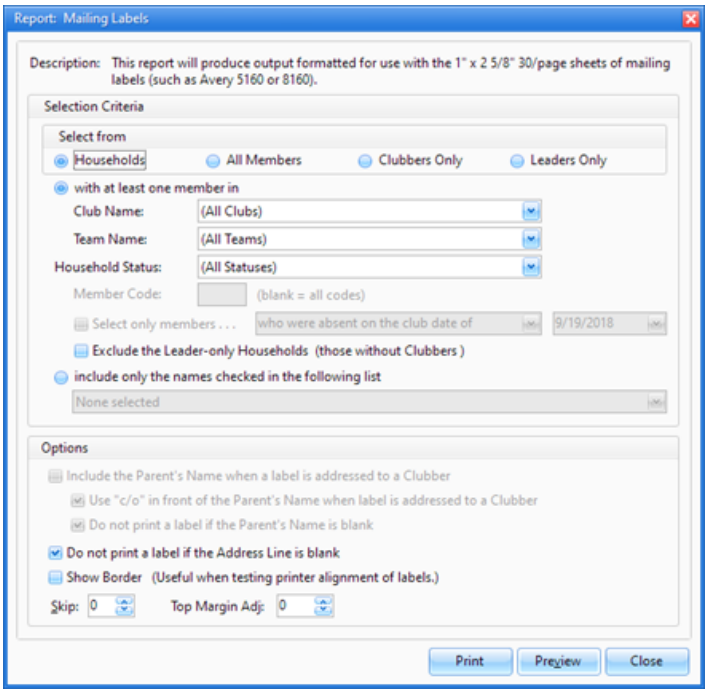
Leader Training History (All Clubs) ASC Awana Club
Active Leaders as of 11/19/2014 4917 Example Street
Madison, WI 53714

Leader Name / Description of Training / Qualification	Required	Completed	Date	Note
Allan, Jack				
Line Judge Certification	No	Yes	3/24/2012	
Background Check	Yes	Yes	8/13/2003	
Child Protection Training	Yes	Yes	11/6/2004	
Getting Started - Part 2	Yes	Yes	8/18/2007	
Getting Started Training - Part 1	Yes	Yes	8/11/2007	
Allan, Janice				
Background Check	Yes	Yes	8/3/2005	
T&T Leader Basic Training	No	No	4/7/2012	
Orientation	Yes	Yes	9/3/2011	
Gospel Wheel	No	Yes	9/28/2011	
Child Protection Training	Yes	Yes	11/6/2004	
Getting Started - Part 2	Yes	Yes	8/18/2007	
Getting Started Training - Part 1	Yes	Yes	8/11/2007	
Arlington, Marissa				
Background Check	Yes	Yes	8/29/2007	
Child Protection Training	Yes	Yes	11/8/2008	
Getting Started - Part 2	Yes	Yes	8/18/2007	
Getting Started Training - Part 1	Yes	Yes	8/11/2007	
Blakemore, Claudia				
Background Check	[illegible]	Yes	8/1/2007	

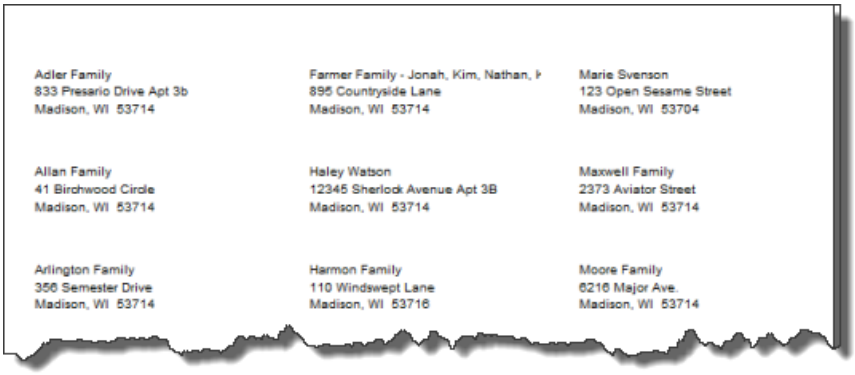
16.16 Mailing Labels

This report will produce mailing labels for either: Households, All Members, Clubbers Only, or Leaders Only. The output is formatted for 1" x 2 5/8" 30/page sheets of mailing labels (such as Avery 5160 or 8160). It provides flexibility in selecting members (even visitors) that were either absent on a given club date or present within a particular date range. This makes it very quick and easy to generate labels for postcards to send to absentee clubbers or new visitors.

Report Dialog



Example Output



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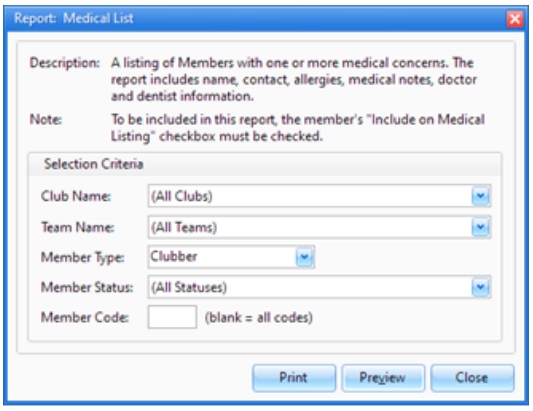
16.17 Medical List

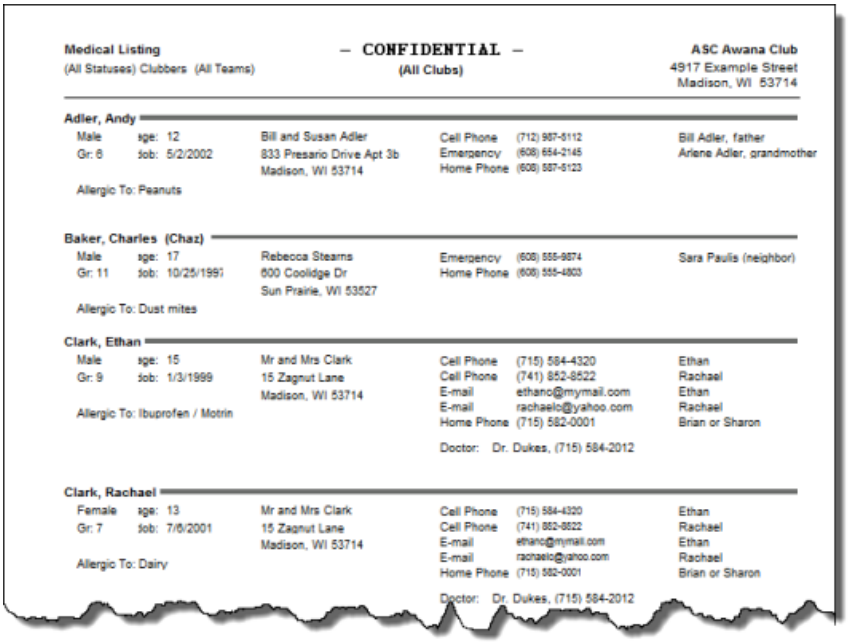
This report lists information that might be needed for members with medical concerns including name, contact information, medical notes, as well as doctor and dentist info.

To be included in this report, the "**Include on Medical Listing**" check box must be selected on the Member's **Misc. tab**.

Report Dialog



Example Output



Medical Listing
(All Statuses) Clubbers (All Teams)

– CONFIDENTIAL –
(All Clubs)

ASC Awana Club
4917 Example Street
Madison, WI 53714

Adler, Andy
Male age: 12 | Gr: 6 dob: 5/2/2002
Allergic To: Peanuts
Bill and Susan Adler, 833 Presario Drive Apt 3b, Madison, WI 53714
Cell Phone (712) 987-5112
Emergency (608) 654-2145
Home Phone (608) 587-5123
Bill Adler, father
Arlene Adler, grandmother

Baker, Charles (Chaz)
Male age: 17 | Gr: 11 dob: 10/25/1991
Allergic To: Dust mites
Rebecca Stearns, 600 Coolidge Dr, Sun Prairie, WI 53527
Emergency (608) 555-9874
Home Phone (608) 555-4803
Sara Paulis (neighbor)

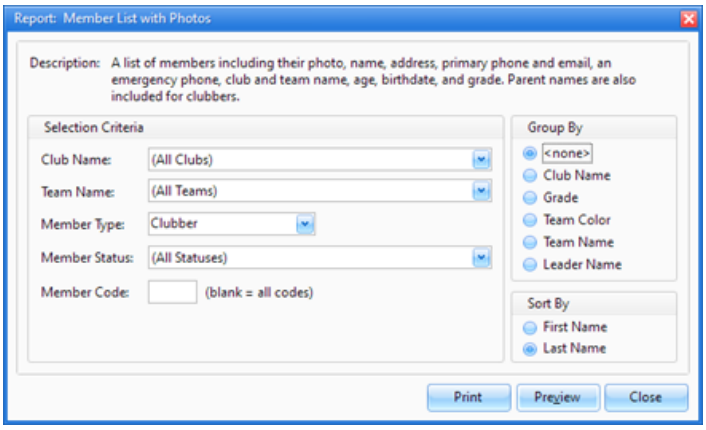
Clark, Ethan
Male age: 15 | Gr: 9 dob: 1/3/1999
Allergic To: Ibuprofen / Motrin
Mr and Mrs Clark, 15 Zagnut Lane, Madison, WI 53714
Cell Phone (715) 584-4320 — Ethan
Cell Phone (741) 852-8522 — Rachael
E-mail ethanc@mymail.com — Ethan
E-mail rachaelc@yahoo.com — Rachael
Home Phone (715) 582-0001 — Brian or Sharon
Doctor: Dr. Dukes, (715) 584-2012

Clark, Rachael
Female age: 13 | Gr: 7 dob: 7/6/2001
Allergic To: Dairy
Mr and Mrs Clark, 15 Zagnut Lane, Madison, WI 53714
Cell Phone (715) 584-4320 — Ethan
Cell Phone (741) 852-8522 — Rachael
E-mail ethanc@mymail.com — Ethan
E-mail rachaelc@yahoo.com — Rachael
Home Phone (715) 582-0001 — Brian or Sharon
Doctor: Dr. Dukes, (715) 584-2012

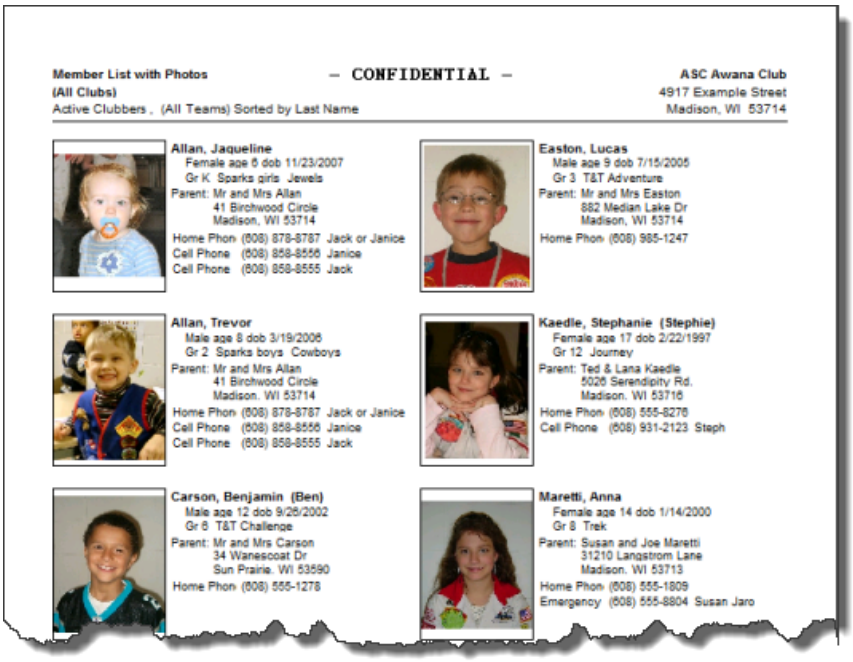
16.18 Member List with Photos

This report provides a directory style list of members. In addition to the photo, the following is included: name, address, phone numbers, club name, and team name. For clubbers, age, date of birth, grade and parent names are also included.

Report Dialog



Example Output



Member List with Photos — CONFIDENTIAL — ASC Awana Club
(All Clubs) 4917 Example Street
Active Clubbers , (All Teams) Sorted by Last Name Madison, WI 53714

Allan, Jaqueline
Female age 6 dob 11/23/2007
Gr K Sparks girls Jewels
Parent: Mr and Mrs Allan
41 Birchwood Circle
Madison, WI 53714
Home Phon (608) 878-8787 Jack or Janice
Cell Phone (608) 858-8556 Janice
Cell Phone (608) 858-8555 Jack

Easton, Lucas
Male age 9 dob 7/15/2005
Gr 3 T&T Adventure
Parent: Mr and Mrs Easton
882 Median Lake Dr
Madison, WI 53714
Home Phon (608) 985-1247

Allan, Trevor
Male age 8 dob 3/19/2006
Gr 2 Sparks boys Cowboys
Parent: Mr and Mrs Allan
41 Birchwood Circle
Madison, WI 53714
Home Phon (608) 878-8787 Jack or Janice
Cell Phone (608) 858-8556 Janice
Cell Phone (608) 858-8555 Jack

Kaedle, Stephanie (Stephie)
Female age 17 dob 2/22/1997
Gr 12 Journey
Parent: Ted & Lana Kaedle
5026 Serendipity Rd.
Madison, WI 53716
Home Phon (608) 555-8276
Cell Phone (608) 931-2123 Steph

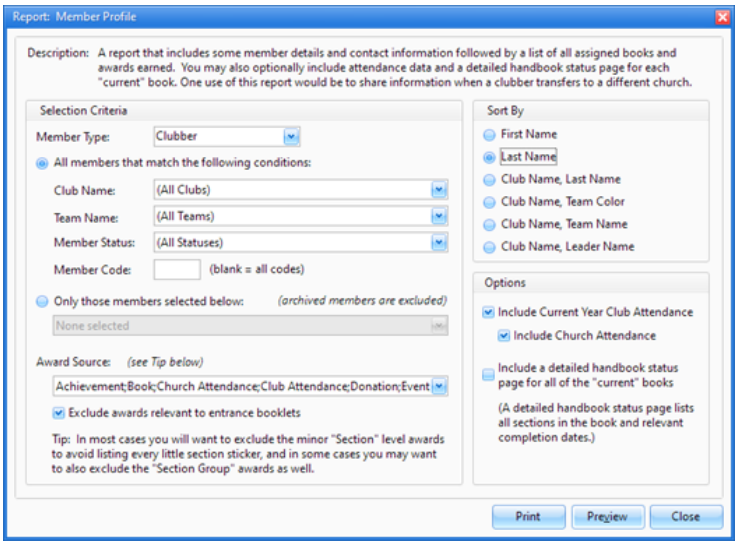
Carson, Benjamin (Ben)
Male age 12 dob 9/26/2002
Gr 6 T&T Challenge
Parent: Mr and Mrs Carson
34 Wanescoat Dr
Sun Prairie, WI 53590
Home Phon (608) 555-1278

Maretti, Anna
Female age 14 dob 1/14/2000
Gr 8 Trek
Parent: Susan and Joe Maretti
31210 Langstrom Lane
Madison, WI 53713
Home Phon (608) 555-1809
Emergency (608) 555-8804 Susan Jaro

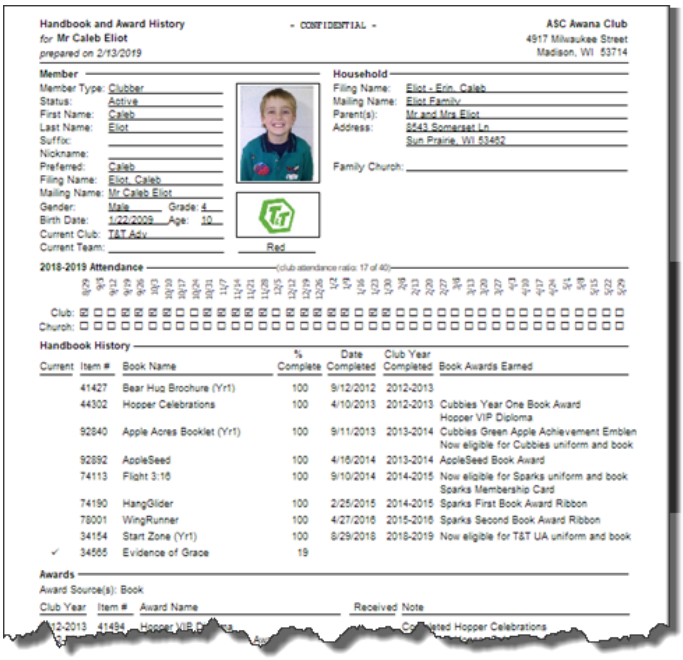
16.19 Member Profile

This report includes some member details and contact information followed by a list of all assigned books and awards earned. Attendance data and detailed handbook status pages for "current" books can also be included. This report can be used to share information when a clubber transfers to another club.

Report Dialog



Example Output

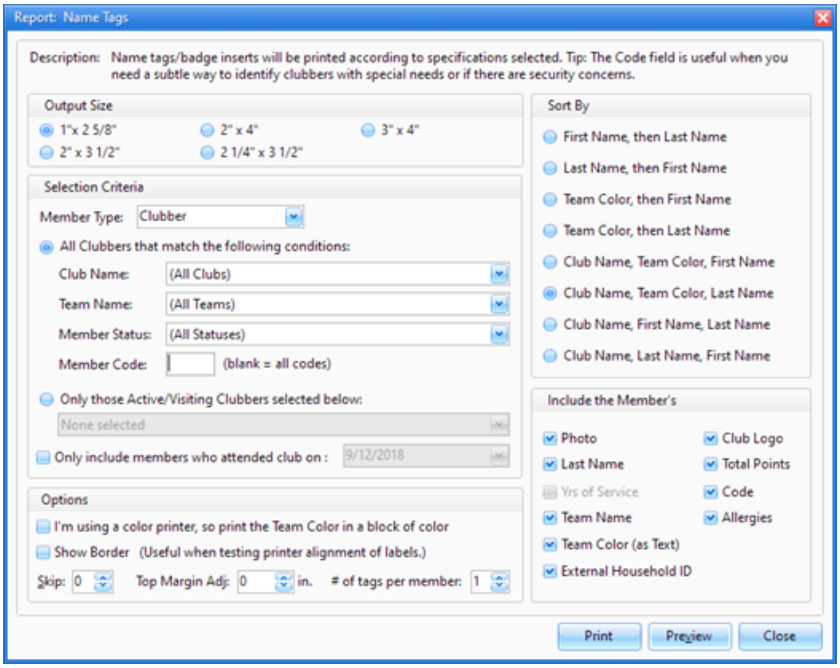


16.20 Name Tags

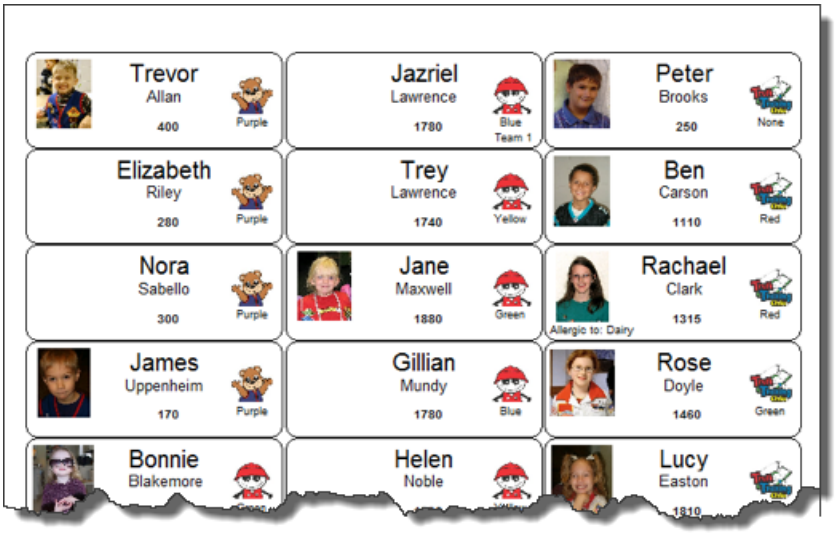
This report prints Name Tags/Badges according to the specifications selected.

The Code field is useful as a subtle way to identify clubbers with food allergies, special needs or if there are security concerns.

Report Dialog



Example Output

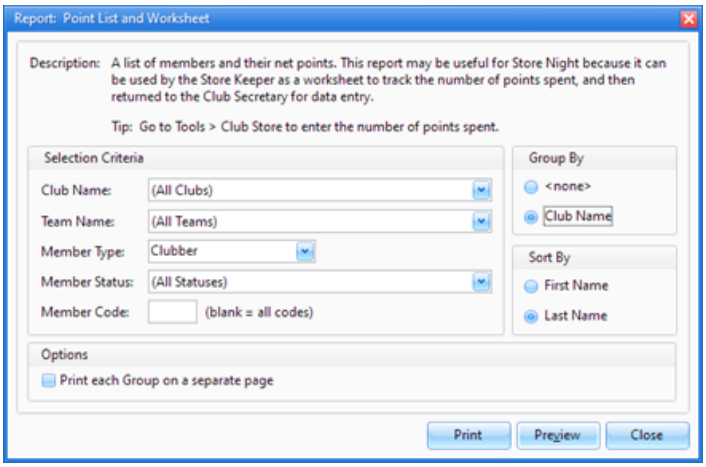


16.21 Point List and Worksheet

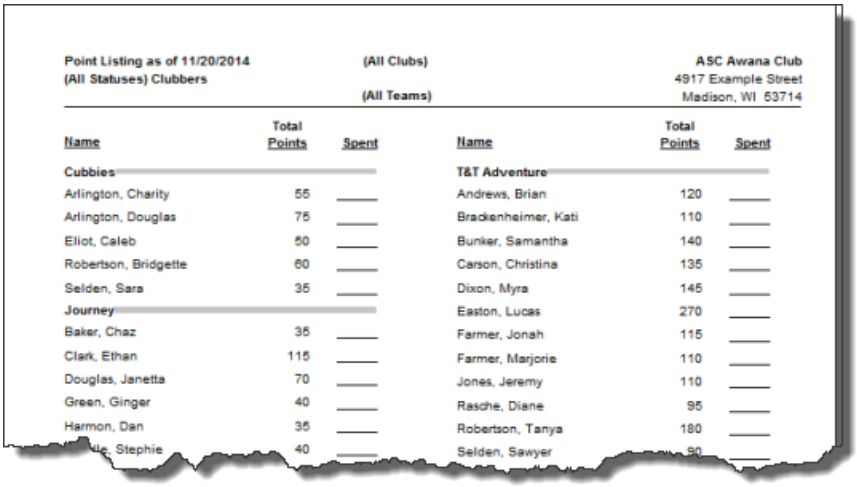
This report lists net points earned by members. It can be especially useful for Store Night since it can be used by the Store Keeper as a worksheet to track the number of points spent, and then returned to the Club Secretary for data entry.

To enter the number of points spent, select **Tools > Club Store** from the Main Menu bar.

Report Dialog



Example Output



Point Listing as of 11/20/2014
(All Statuses) Clubbers

(All Clubs)
(All Teams)

ASC Awana Club
4917 Example Street
Madison, WI 53714

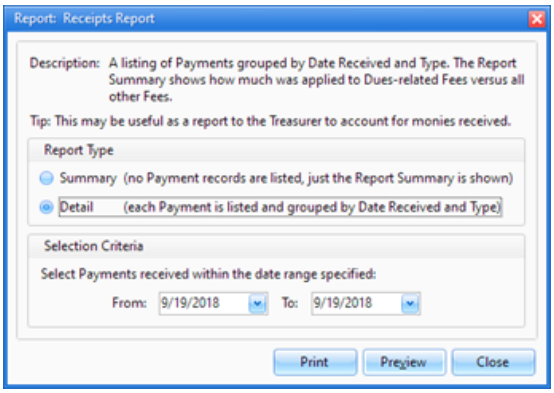
Name	Total Points	Spent	Name	Total Points	Spent
Cubbies			**T&T Adventure**		
Arlington, Charity	55	____	Andrews, Brian	120	____
Arlington, Douglas	75	____	Brackenheimer, Kati	110	____
Eliot, Caleb	50	____	Bunker, Samantha	140	____
Robertson, Bridgette	60	____	Carson, Christina	135	____
Selden, Sara	35	____	Dixon, Myra	145	____
Journey			Easton, Lucas	270	____
Baker, Chaz	35	____	Farmer, Jonah	115	____
Clark, Ethan	115	____	Farmer, Marjorie	110	____
Douglas, Janetta	70	____	Jones, Jeremy	110	____
Green, Ginger	40	____	Rasche, Diane	95	____
Harmon, Dan	35	____	Robertson, Tanya	180	____
[illegible]e, Stephie	40	____	Selden, Sawyer	90	____

16.22 Receipts Report

This report provides a listing of Payments grouped by Date Received and Type. The Report Summary shows how much was applied to Dues related Fees versus all other Fees. It also includes amounts for Offerings/Donations.

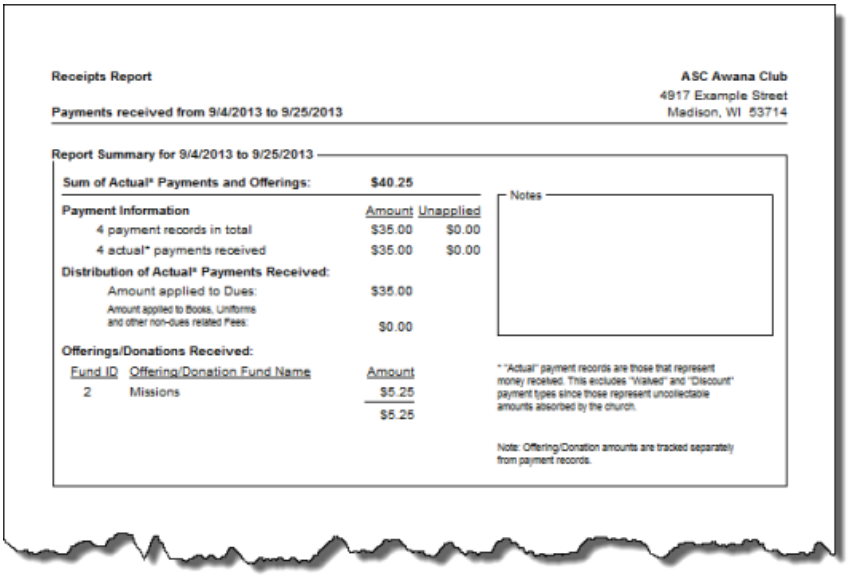
This report can be useful to the Treasurer to account for monies received.

Report Dialog



Example Output

Report Type: Summary



Receipts Report

Payments received from 9/4/2013 to 9/25/2013

ASC Awana Club
4917 Example Street
Madison, WI 53714

Report Summary for 9/4/2013 to 9/25/2013

Sum of Actual* Payments and Offerings:	**$40.25**	
Payment Information	Amount	Unapplied
4 payment records in total	$35.00	$0.00
4 actual* payments received	$35.00	$0.00
Distribution of Actual* Payments Received:		
Amount applied to Dues:	$35.00	
Amount applied to Books, Uniforms and other non-dues related Fees:	$0.00	

Offerings/Donations Received:

Fund ID	Offering/Donation Fund Name	Amount
2	Missions	$5.25
		$5.25

Notes

* "Actual" payment records are those that represent money received. This excludes "Waived" and "Discount" payment types since those represent uncollectable amounts absorbed by the church.

Note: Offering/Donation amounts are tracked separately from payment records.

Report Type: Detail

Receipts Report

ASC Awana Club
4917 Example Street
Madison, WI 53714

Payments received from 9/4/2013 to 9/25/2013

9/4/2013

Cash

ID	Household	Type	Ref	Amount	Unapplied	Payor	Note
4729	Allen - David, Mikayla, Do	Cash		$0.50	$0.00		
4724	Clark - Penny	Cash		$17.00	$0.00		
4731	Maretti - Anna, Michael	Cash		$17.00	$0.00		
4727	Thomas - Miranda	Cash		$0.50	$0.00		
	4	Cash		$35.00	$0.00		
4	payment records for 9/4/2013			$35.00	$0.00		

Report Summary for 9/4/2013 to 9/25/2013

Sum of Actual* Payments and Offerings: **$40.25**

Payment Information	Amount	Unapplied
4 payment records in total	$35.00	$0.00
4 actual* payments received	$35.00	$0.00
Distribution of Actual* Payments Received:		
Amount applied to Dues:	$35.00	
Amount applied to Books, Uniforms and other non-dues related Fees:	$0.00	

Offerings/Donations Received:

Fund ID	Offering/Donation Fund Name	Amount
2	Missions	$5.25
		$5.25

Notes

* "Actual" payment records are those that represent money received. This excludes "Waived" and "Discount" payment types since those represent uncollectable amounts absorbed by the church.

Note: Offering/Donation amounts are tracked separately from payment records.

16.23 Registration Form

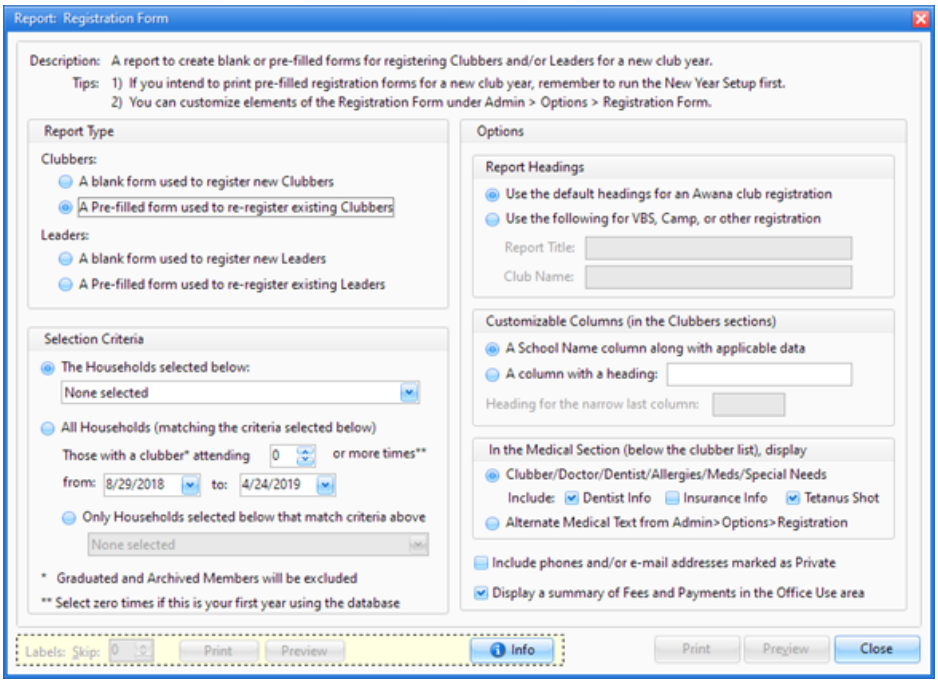
This report creates blank or pre-filled forms for registering clubbers and/or leaders for a new club year.

Customize parts of the Registration Form under **Admin > Options > Registration Form**.

If printing pre-filled registration forms for a new club year, run the New Year Setup first.

On the report dialog under Options, choose a custom report title for VBS, Camp or other registration.

Report Dialog



Example Output

Pre-filled Clubber Registration Form

Awana Clubber Registration — CONFIDENTIAL — **ASC Awana Club**

Club Year: 2013-2014 - Please Print - 4917 Example Street
Madison, WI 53714

Instructions: Please review the following information for accuracy and make changes as needed. You may use the backside of this form if you need more room to write.

Allan - Jack, Janice, Trevor, Jaqueline

			Phone / E-Mail Address	Contact Person
Parent(s):	Mr and Mrs Allan	Cell Phone	(608) 858-8555	Jack
Address:	41 Birchwood Circle	Cell Phone	(608) 858-8556	Janice
	Madison, WI 53714	E-mail		
Home Church:	East Madison Baptist Church	Emergency		
Persons (other than parents) authorized to pick up the children:		Home Phone	(608) 878-8787	Jack or Janice
		Work Phone		

Registe	Child's Name	Nicknam	Birth Dat	Gender	Grade	School	Club	Need Book	Need Uniforr
☐	Jaqueline Allan		11/23/2007	Female	K		Sparks girls	☑	☑
☐	Trevor Allan		3/19/2006	Male	2		Sparks boys	☑	☐

Clubber	Doctor Name and Phone	Dentist Name and Phone	Allergies / Meds / Special Needs
Jaqueline			
Trevor			

I am interested in helping: ___ Weekly ___ Every other week ___ Monthly ___ For Special Events
Note: All Awana Club leaders and listeners must submit to a background check before working with the children.
Testing line 3 printing.

Terms and Conditions

1) I understand that my child/children may participate in physical activities such as those held during Game Time. As with any physical activity, there is a risk of injury. I fully accept this risk and hold harmless from any legal liability, East Madison Baptist Church and any persons involved in the Awana Club ministry.

2) In the event of an emergency that requires medical treatment for the above named child/children, I understand every effort will be made to contact me or my emergency contact. However, if I/we cannot be reached, I give my permission to the AWANA volunteers to secure the services of a licensed physician to provide the care necessary for my child's well being. I assume responsibility for all costs connected to any accident or treatment of my child.

3) I grant permission for a photo of my child to appear in an unpublished club directory to be used by Awana Leaders only. I also give permission for photo(s) of my child to appear among other general club photos as long as there is no identifying information shown.

4) I grant permission for my child to travel to/from Awana Club events with an adult leader. Any such event will be clearly communicated with me beforehand.

I have read and agree to the Terms and Conditions stated above

X _____ _____
Signature of Parent/Guardian Date

Office Use

Fees:

Dues	___	_____
Book	___	_____
Uniform	___	_____
___	___	_____
___	___	_____

Total Due _____

Amt Paid _____

11/20/2014 12:14:42 PM — CONFIDENTIAL —

Pre-filled Leader Registration Form

Awana Leader Registration

Club Year: 2013-2014 - Please Print -

ASC Awana Club
4917 Example Street
Madison, WI 53714

Thank you for serving in our Awana Club Ministry. Please review the following information for accuracy and make changes or additions as needed. Once completed, sign and return this form to _____ on or before _____. If you have any questions, please contact _____.

Mr Jack Allan

Filing Name: Allan, Jack
Address: 41 Birchwood Circle
Madison, WI 53714
Birth Date: _____ (confidential) Gender: Male
Home Church: East Madison Baptist Church

	Phone / E-Mail Address	Contact Person
Cell Phone	(608) 858-8555	Jack
Cell Phone	(608) 858-8556	Janice
E-mail		
Emergency		
Home Phone	(608) 878-8787	Jack or Janice
Work Phone		

Awana Service History

Club	Leadership Role	Club Year	Church Name	Note
Journey	Leader	2013-2014	East Madison Baptist Church	
Journey	Leader	2012-2013	East Madison Baptist Church	
Journey	Leader	2011-2012	East Madison Baptist Church	
Journey	Leader	2010-2011	East Madison Baptist Church	
Journey	Leader	2009-2010	East Madison Baptist Church	

__ more service records are on file

Training History

Description	Date	Note
Line Judge Certification	3/24/2012	
Getting Started - Part 2	8/18/2007	
Getting Started Training - Part 1	8/11/2007	
Child Protection Training	11/6/2004	
Background Check	8/13/2003	

Medical Information (use the back of this form if needed)
Allergies / Conditions / Special Needs or Concer

Service Opportunities

What groups of children do you prefer to work with?
__ Nursery __ Pre-school __ K-2nd Gr __ 3rd-6th Gr __ 7th-8th Gr __ 9th-12th Gr
What Leadership Roles are you interested in?
__ Listener __ Leader __ Director __ Game Director __ Music __ Recordkeeping __ Council Time
__ Special Events __ Other: _____
CPR Trained? ____ Yes ____ No

Terms and Conditions

<< Enter your own church-approved text here.
Items to consider including:

1) Committment to serve with integrity and follow club leadership protocol,
2) set a good example for clubbers by wearing uniform and arriving on time,
3) ask about any felony convictions, 4) grant authorization for the church to run a confidential background check. >>

TIP: You can change the font by using MS Word or even Wordpad to compose your custom text. Once you are done, simply copy the text from your editor of choice and paste it into this field. Be sure to test the results by previewing the Registration form reports.

I have read and agree to the Terms and Conditions stated above

X _____ _____
Signature of Leader Date

Office Use

<< Use this area to track club assigments, uniform and/or book needs, completion of other requirements, LIT indicator, misc notes, date the info was updated in AW, etc. Customize the text under Admin > Options > Registration Form > Office Use. >>

11/20/2014 12:20:05 PM * Phone numbers and E-Mail addresses marked as private will be considered confidential

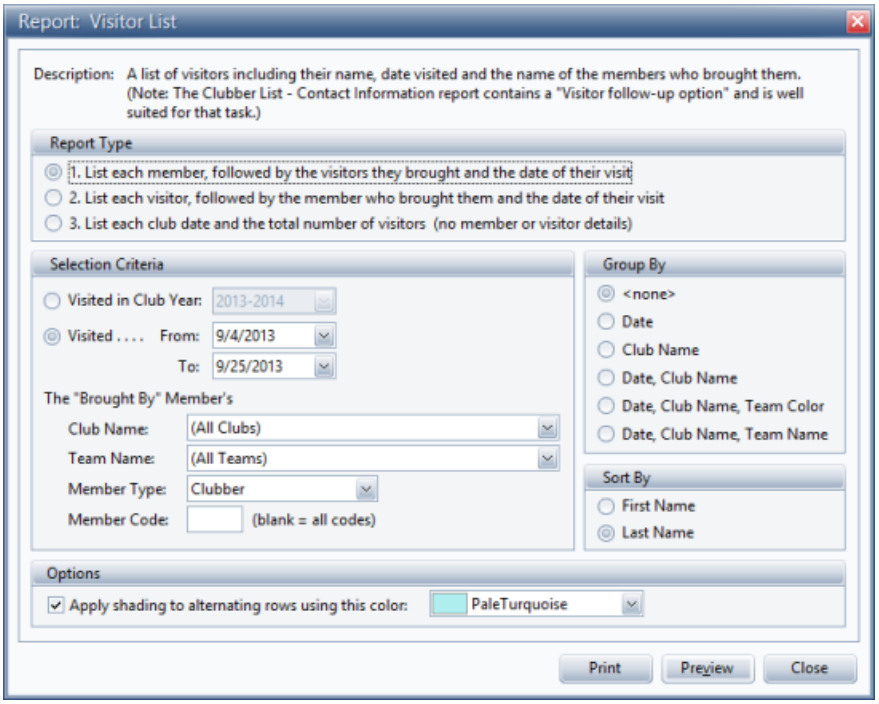
16.24 Visitor List

This report lists visitor information including name, date of the visit, club visited and the name of the member who brought the guest. There are three types of Visitor Reports:

1. List each member that brought a visitor, followed by the name of the visitor and the date of the visit.
2. List each visitor, followed by the "brought by" member and the date of the visit.
3. List each club date along with the total number of visitors (no member or visitor details).

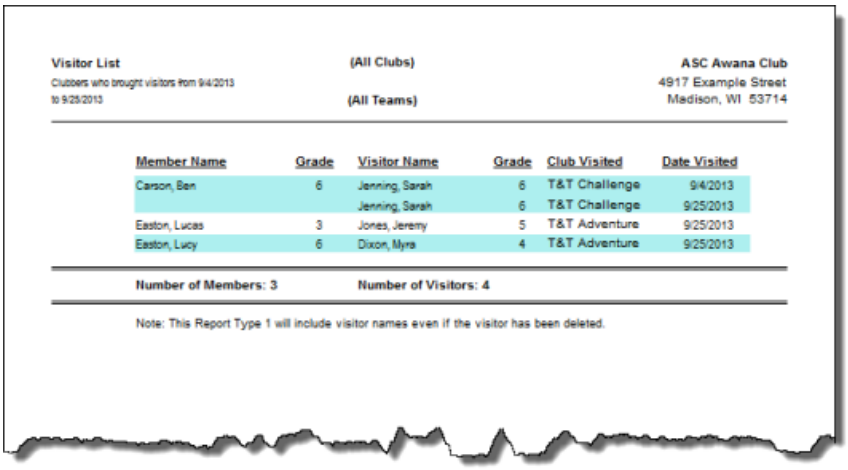
[Currently not available.]

Report Dialog



Example Output

Report Type #1



Visitor List
Clubbers who brought visitors from 9/4/2013 to 9/25/2013

(All Clubs)
(All Teams)

ASC Awana Club
4917 Example Street
Madison, WI 53714

Member Name	Grade	Visitor Name	Grade	Club Visited	Date Visited
Carson, Ben	6	Jenning, Sarah	6	T&T Challenge	9/4/2013
		Jenning, Sarah	6	T&T Challenge	9/25/2013
Easton, Lucas	3	Jones, Jeremy	5	T&T Adventure	9/25/2013
Easton, Lucy	6	Dixon, Myra	4	T&T Adventure	9/25/2013

Number of Members: 3 **Number of Visitors: 4**

Note: This Report Type 1 will include visitor names even if the visitor has been deleted.

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Report Type #2

Visitor List
Visitors attending from 9/4/2013 to 9/25/2013

(All Clubs)

(All Teams)

ASC Awana Club
4917 Example Street
Madison, WI 53714

Visitor Name	Grade	Brought By	Grade	Club Visited	Date Visited
Dixon, Myra	4	Easton, Lucy	6	T&T Adventure	9/25/2013
Jenning, Sarah	6	Carson, Ben	6	T&T Challenge	9/4/2013
		Carson, Ben	6	T&T Challenge	9/25/2013
Jones, Jeremy	5	Easton, Lucas	3	T&T Adventure	9/25/2013

Number of Visitors: 3

Note: This Report Type 2 will not include the names of visitors who have been deleted.

Report Type #3

Visitor List Summary
Number of Visitors from 9/4/2013 to 9/25/2013

ASC Awana Club
4917 Example Street
Madison, WI 53714

Date	Number of Visitors
9/4/2013	1
9/25/2013	3
Total:	**4**

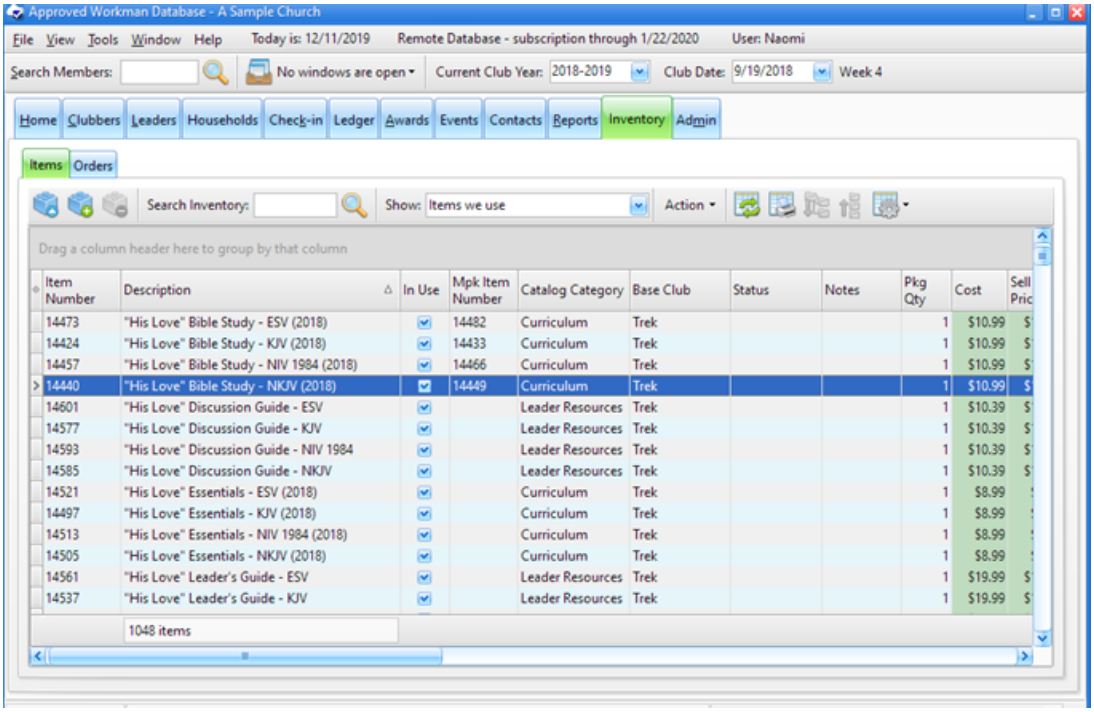
Chapter 17

17 The Inventory Module

The Inventory Module contains records for all items in the Awana Ministry Supply Catalog. It helps track supplies of books, uniforms, awards, store items, game supplies, etc. Setting re-order levels will help you add items to an Order when the quantity in stock gets low.

The Order is **not** automatically transmitted to Awana ordering. You will still need to submit it.

The Inventory page manages Items and Orders. For an overview, see Working with Inventory.

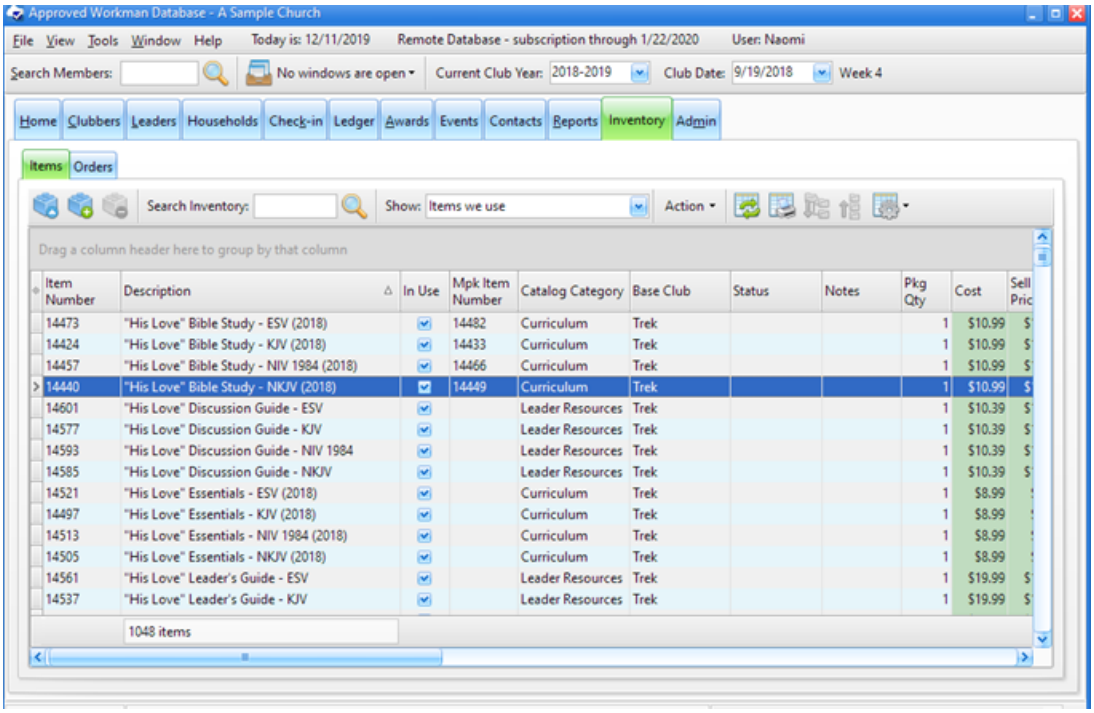


17.1 Items

Click on the **Inventory > Items** tab to open, add, or delete inventory items.

The inventory is periodically updated, so it's unusual to need to add a new item. However, it could come in handy for adding an item not issued by Awana Clubs International.

For items that you don't use, use the search tool or filters to find them and mark them as Not In Use. (To speed up the process, select multiple items and mark them all with one action!)



Toolbar

Icon	Action	Description
	Open Item	Opens the selected item in the Inventory Item window. (Pressing the **Enter** key with a row selected or double clicking the row also opens the inventory item.)
	New Item (Ctrl-N)	Opens the Inventory Item window with blank/default values to create a new inventory item.
	Delete Item(s) (Ctrl-D)	Removes the selected item(s). We recommend not deleting items. Instead, set the item as being "Not in Use".
	Search Inventory	Filters the grid to show only those items whose Description or Item # matches the search criteria entered in the text field. (You can also press the Enter key to perform the search/filter.)
	Show	Filters the data in the grid based on **All Items**, **Items we use**, **Items we use and need to order,** or **Items we do not use**.
	Add Item to Order*	Adds the selected item to an open order. A new Order will be created if there is not one currently open.
	Mark Item(s) as In Use*	Marks the selected item(s) as one(s) that your Awana program uses.

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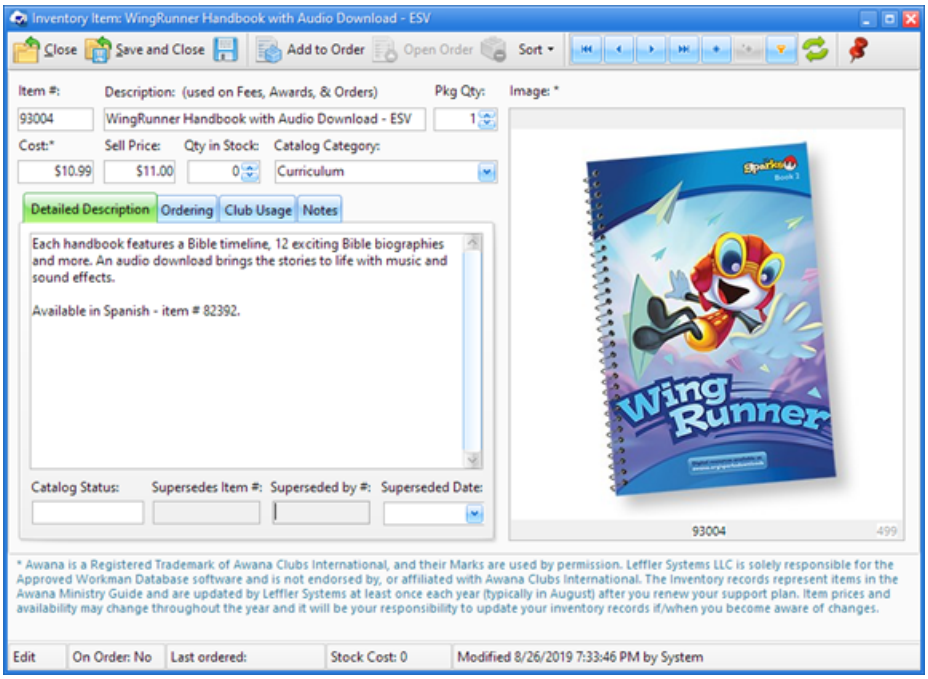
	Mark Item(s) as Not In Use*	Marks the selected item(s) as one(s) that your Awana program does *not* use.
	Set Expense Category*	Sets the expense category for the selected item(s).
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

* These items are available from the **Action** drop-down menu on the Toolbar.

Many of the actions are also available through the right click pop-up menu.

17.1.1 The Inventory Item Window

Opening or creating an item opens the Inventory Item window to view, modify, or enter details.



Toolbar

Icon	Action	Description
	Close	Closes the Item Window without saving current changes.
	Save and Close	Saves the changes and then closes the Item Window.
	Save	Saves the changes and leaves the Item Window open.

	Add to Order	Adds the selected item to an open order. A new Order will be created if there is not one currently open.
	Open Order	Opens the relevant order if the item is On Order. The button is disabled if the current item is not On Order.
	Sort	Determines the sort order by **Item Number** or **Item Description** based on selection from the drop-down list.
	Navigation Buttons	Provides navigation options to other items in the same window. Located in the top right corner. Changes made to the current record will be automatically saved.
	Refresh	Refreshes the data currently displayed in the Item Window.
	Stay On Top	Toggles whether or not the window stays on top of the main window.

General Item Information

The general information is located above the tabbed panel and includes:

- **Item #** and **Description -** for items from Awana Clubs International, these fields match the Awana catalog. For items you buy elsewhere, set as desired. The search box works on these fields.
- **Pkg Qty -** number of items in a package. For example, if there are 5 in a package, an order of 1 of that item results in 1 package with 5 items in it. The default is set to 1.
- **Cost -** amount used when an item is ordered. It should match Awana's current catalog price, if applicable.
- **Sell Price -** amount used when a fee is created.

  Consider slightly increasing the **Sell Price** of items like uniforms and books to cover shipping costs.

- **Qty in Stock** - number of the item you currently have. The default is 0. This value is adjusted automatically as items are depleted by assigning books, when awards are earned, or when creating a fee (such as for a book bag). It is increased when the **Status** of an Order is set to Received and individual items are marked received.
- **Category -** drop-down list populated based on **Admin > Generic Lookups** > **Inventory Categories**.

  This is especially useful when filtering the Item grid.

- **Image -** for items from the Awana Catalog, the image is provided. For custom items, right click to paste or load an image from a file.

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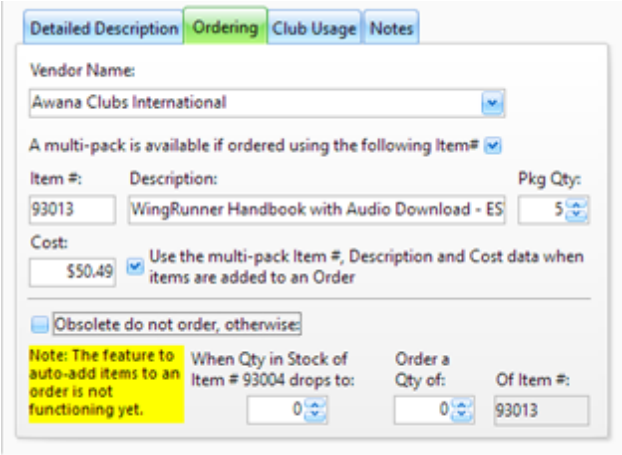
Detailed Description

This tab provides a detailed description of the item. This will normally match the Awana Catalog.

It is not unusual for Awana Clubs International to introduce new items in their catalog. Some items will replace older items, making the older item obsolete. These inventory details will all be maintained during the annual inventory and curriculum update. Otherwise, enter the **Status in the catalog**, **Supersedes Item #**, and **Superseded by #** information.

Ordering

The **Ordering** tab provides information related to the ordering of an item.



- **Vender Name** - selection options are determined by **Admin > Generic Lookups** > **Vendors**.
- **A multi-pack is available if ordered using the following Item #** - indicates a multi-pack should be ordered instead of single items, when available. Fields for the details of the multi-pack are enabled when the option is selected.
- **Obsolete do not order** - indicates an item is no longer available. When checked, the fields below it are disabled.
- **When Qty in Stock of Item # is:**, **Order a Qty of:** - for items that are not obsolete, these fields indicate when the item should be added to an order and how many to order. [This does not happen automatically at this time, but is listed as an enhancement. In the meantime, set the values and use the filter on the Items grid to Show: **Items we use and need to order**.]

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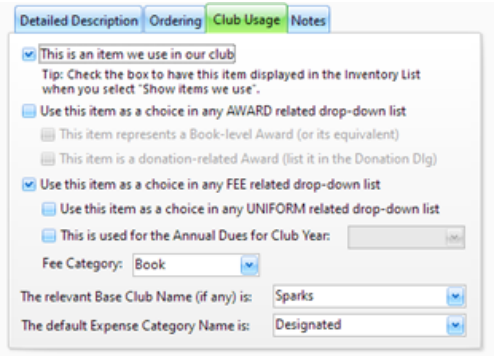
Club Usage

The **Club Usage** tab includes information on if and how an item is used in your club.



- **This is an item we use in our club -** indicates the item is one you use.

  Items can also be marked as 'in use' or 'not in use' on the Main Inventory Items grid by selecting items and using the **Action** menu or right click pop-up menu. Multi-selecting records speeds up the process.

- **Use this item as a choice in any AWARD related drop-down list -** indicates the item will be included in any drop-down list used for choosing awards. When checked, selection of a **Book-level Award** or **Donation-related Award** can also be indicated.

- **Use this item as a choice in any FEE related drop-down list** - indicates the item will be included in any drop-down list used for choosing fees, such as the Fee dialog.

- **Use this item as a choice in any UNIFORM related drop-down list** -indicates the item will be included in any drop-down list used for choosing uniforms, such as the Assign Uniform dialog.

- **This is used for the Annual Dues for Club Year:** - indicates payments for dues for the specified year should go towards this item.

  The Fee for dues will generally be added during an update so this would only be necessary if you add a fee for dues yourself.

- **The relevant Base Club Name (if any) is: -** indicates the club that generally uses the item.

  This is especially useful when filtering the Item grid.

- **The default Expense Category Name is:** - selection options are determined by **Admin > Generic Lookups** > **Expense Categories**.

  This helps in filtering and/or grouping Fee and Line Item records to get Expense Category totals.

  The expense category can also be set on the Main Inventory Items grid by selecting item/s and then using the **Action** drop-down, or the right click pop-up menu.

Notes

Use this area to track any additional information related to the item.

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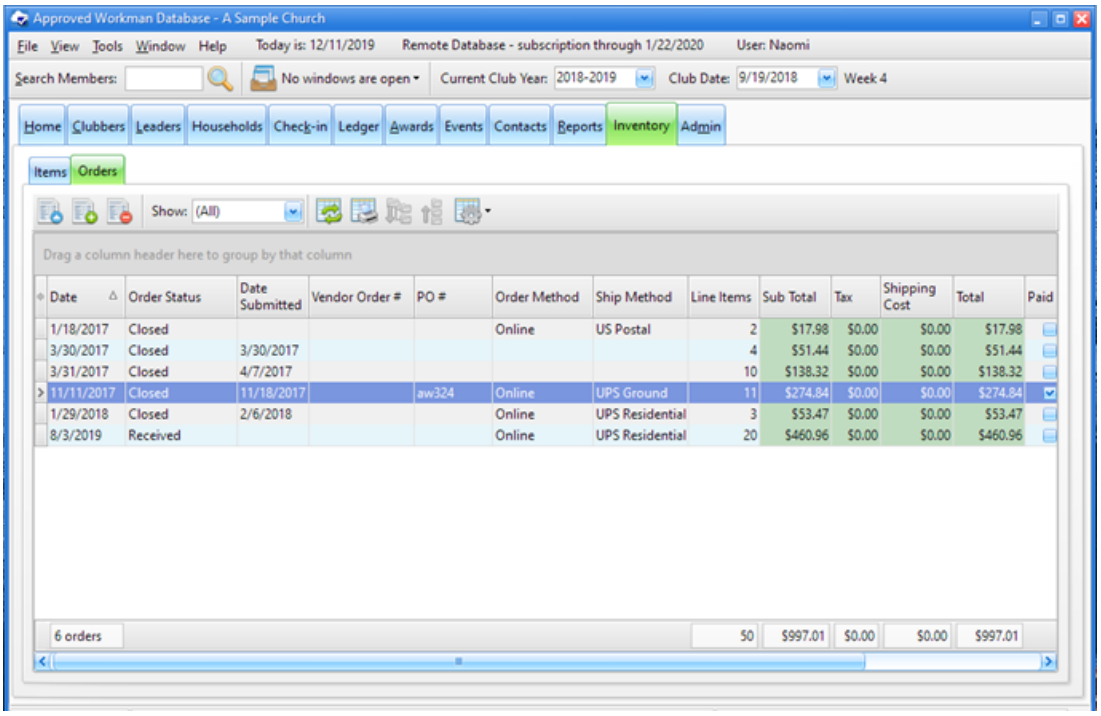
17.2 Orders

The **Inventory > Orders** tab tracks past orders, allows creation of new orders, and modification of "Open" orders. The grid's footer shows details about orders placed, items ordered and money spent on all orders. [Also, amount spent on shipping. (There's an eye-opener!)]

By managing your inventory closely, you can be proactive with orders, reducing the number of orders and thus saving a significant amount on shipping over a club year.

Creating an order in the Windows App does not actually place the order with Awana Clubs International. It is only a tool to help in the process.

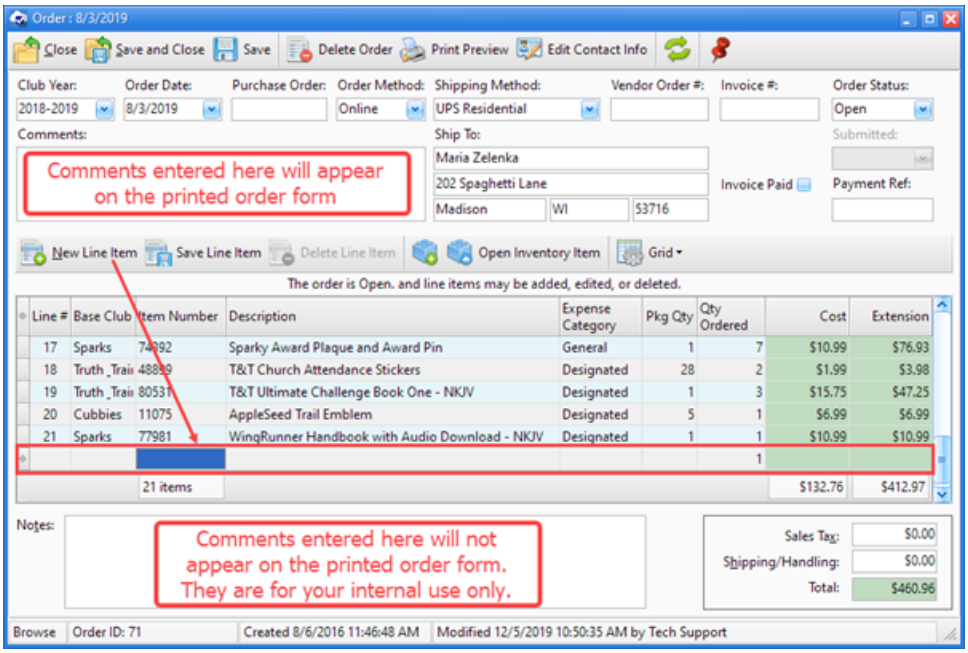


Icon	Action	Description
	Open Order	Opens the selected order in the Order window. (Pressing the **Enter** key with a row selected or double clicking the row also opens the order.)
	New Order (Ctrl-N)	Opens the Order window with blank/default values to create a new order.
	Delete Order (Ctrl-D)	Removes the selected order.
	Show	Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

17.2.1 The Order Window

Opening or creating a new Order opens the Order window to view, modify, or enter details of an order.

Creating an order within the Windows App does not actually place the order with Awana Clubs International, but can assist in placing the order.



Toolbar

Icon	Action	Description
	Close	Closes the Order Window without saving current changes.
	Save and Close	Saves the changes and then closes the Order Window.
	Save	Saves the changes and leaves the Order Window open.
	Delete Order	Removes the current Order.
	Print Preview	Displays the order in a format appropriate for e-mailing or faxing to Awana Clubs International. It uses the information under **Admin > General** > **Supply Order - Default Values** page. Printing is done from the Preview window.
	Edit Contact Info	Opens a dialog to edit the Contact and Ship To information *for this order* which will override the **Admin > General** > **Supply Order - Default Values**.

	Refresh	Refreshes the data currently displayed in the Order Window.
	Stay On Top	Toggles whether or not the window stays on top of the main window.

Order Information

The general information about the order is located just below the toolbar and includes**:**

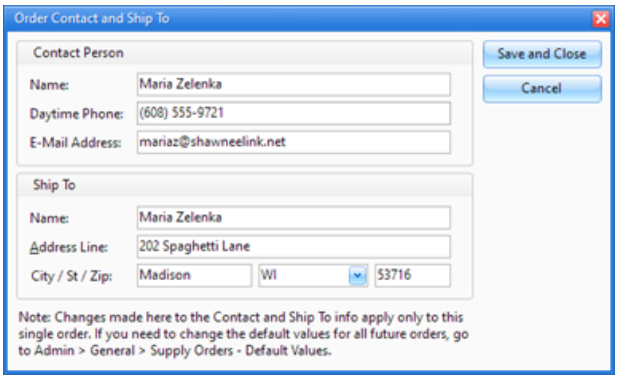
- **Club Year** - defaults to the current club year but can be changed. The Inventory's Order grid can be filtered on the **Club Year** to list only orders within the selected club year.
- **Order Date** - defaults to the current date but can be changed.
- **Purchase Order**, **Order Method**, **Shipping Method**, **Vendor Order #**, **Invoice #** - details relevant to the order.

  The **Shipping Method** values are customizable under **Admin > Generic Lookups** > **Shipping Methods**. Set a default for the **Order Method** and the **Shipping Method** under **Admin** > **General** > **Supply Order - Default Values.**

- **Order Status** - defaults to **Open** when a new order is created. Options include: **Open, Submitted, Received, or Closed.** The status determines what functionality is available. See the Line Items section below for details on changes based on status.
- **Submitted** date - set automatically when **Order Status** set to **Submitted**, but can be changed.
- **Comments** - notes to print on the order form. This is useful if the order is mailed or e-mailed.
- **Invoice Paid** - indicates the invoice was paid. Enter additional details under **Payment Reference**.
- **Notes** - additional information related to the order that does not need to be printed on the form.
- **Sales Tax** and/or **Shipping/Handling** - enter amount(s). The **Total** is automatically calculated.

Contact and Ship To Information

The default Contact and Ship To information used on most orders should be set under **Admin > General** > **Supply Order - Default Values**. To use different contact and shipping information on the current order, click **Edit Contact Info** to display a dialog for setting those values.



Line Items

The line item grid behaves differently depending on the **Order Status** value as follows:

1. **Open** - indicates the order has not yet been placed. This is the default when the order is created. Line items can be added to the order. Each item should have a line item entry in the grid. The following tools are used while the Order is Open to add the line items:

Icon	Action	Description
	New Line Item	Creates a new row. Either select from the drop-down list or type an **Item Number** or **Description**. Update the **Expense Category** and **Qty Ordered** fields if needed. The **Line #**, **Pkg Qty**, **Cost**, and **Extension** are filled in automatically. The **Item Number** or **Description** must match an item in the Inventory Module. As you type, the list will be filtered accordingly. If no match is found, a Warning dialog appears. Changing the **Cost** value in the line item will change the **Cost** in the Inventory Item also! This makes it easy to keep up with mid-year price changes.
	Save Line Item	Saves the changes to the Line Item.
	Delete Line Item	Removes the selected Line Item from the Open Order.
	New Inventory Item	Opens a blank Inventory Item Window to create a new item if an item does not exist that needs to be added to an order. Once the item is created, then click the **New Line Item** button to add it to the order.
	Open Inventory Item	Opens the selected item in the The Inventory Item Window in order to see more details.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

2. **Submitted** - indicates the order has been placed. Setting this status fills in the **Submitted date**. It prevents line items from being added, changed or deleted.

3. **Received** - indicates the order has been delivered. Setting this status adds the **Rcvd, Qty Rcvd** and **Qty on B/O** (Quantity on back order) columns to the grid. As an item is marked as **Rcvd**, the **Qty Rcvd** defaults to the total Qty Ordered and the **Qty on B/O** defaults to zero. If an item was back ordered, update these values as needed. As each Line Item is marked as received and posted, the quantity received is automatically added to the **Item's Qty in Stock**.

Inventory item cost values can be updated by making corrections to the Cost field for a Line Item on the Order Form. If adjustments need to be made to a cost while checking in received orders, make the correction on the line item and the new cost will be updated in the matching Inventory Item record.

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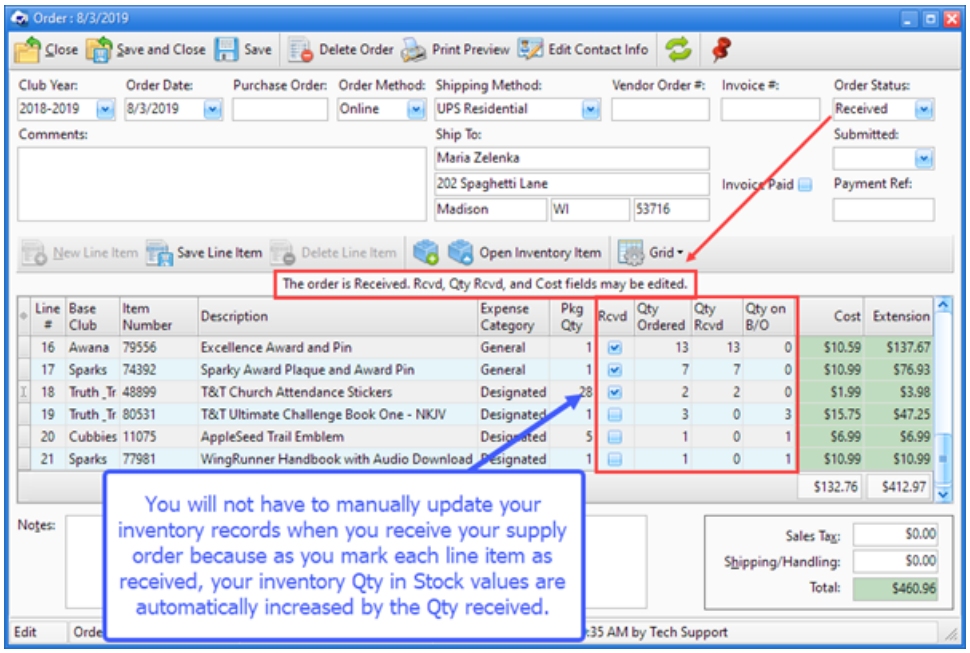


4. **Closed** - indicates everything related to the order is completed. Setting this status prevents the line items from being modified.

Expense Categories

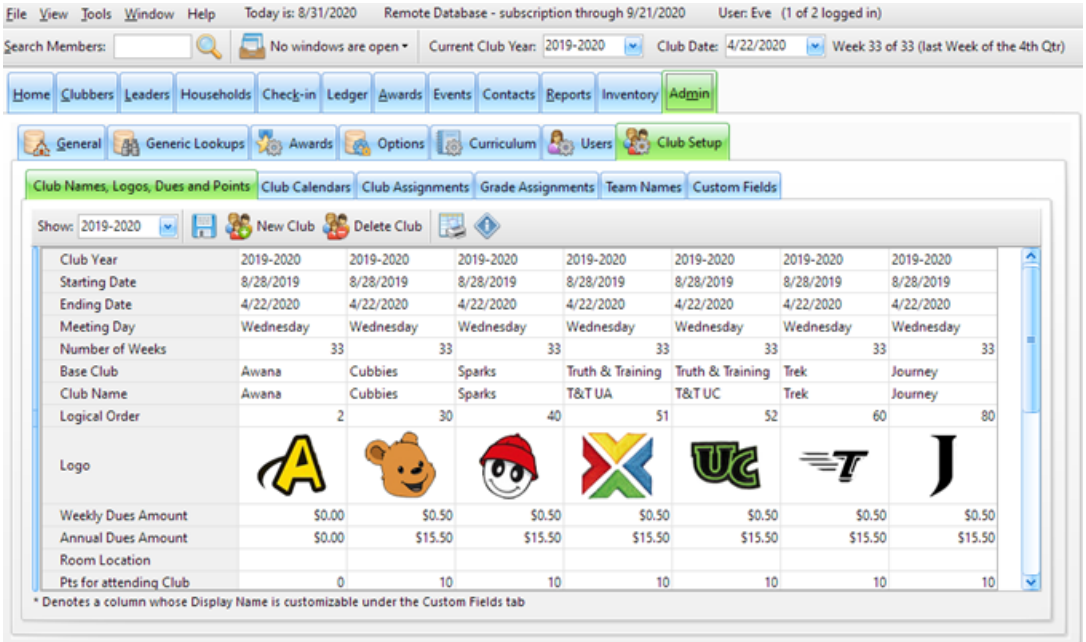
The Expense Category field identifies a budget category for each item. The default value is based on the corresponding Inventory Item record's **Expense Category** value, but can be changed in the Line Items grid. The selection options are determined by **Admin > Generic Lookups** > **Expense Categories**.

To quickly get a total of how much is being spent on an order from various budget categories, drag the Expense Category column header into the grouping area above the grid. (Note: If the Group By box isn't showing, click the Grid button in the toolbar and select "Show Group by box".)

Chapter 18

18 The Admin Module

Since there are many ways to run an Awana Program, there are many ways to customize the Windows App. The Admin Module provides lots of customizing options. Be sure to explore each tab!



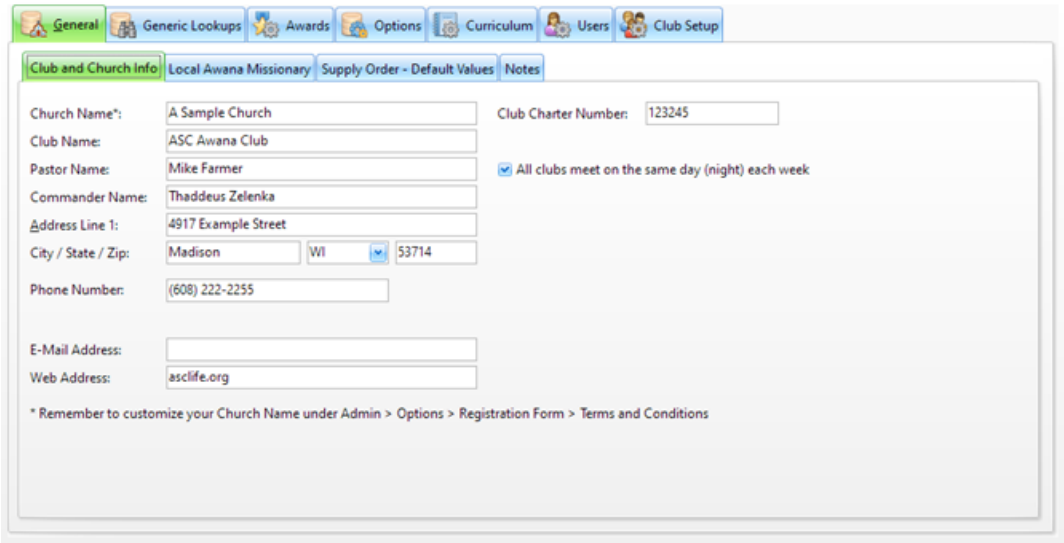
- **General** - pages for Club and Church Info, Local Awana Missionary, Supply Orders, and Notes
- **Generic Lookups** - custom values used in many drop-down lists throughout the application
- **Awards** - settings for Book, Attendance, Event, Leadership Service, and Journey Pin award triggers
- **Options** - customizable settings that affect how the database works in a variety of situations
- **Curriculum** - details for all generic handbooks including specific Section Group Awards
- **Users** - user accounts for all persons who will be granted access to the database
- **Club Setup** - overview of Club Names, Logos, Dues and Points; Club and Grade Assignments; Team Names; and Custom Fields. The New Year Setup process creates the Club Calendar records. Themes, Offering Funds, and Notes for each week can be set under the Club Calendars tab.

18.1 General

The General tab includes information about your Church, Awana program, and Local Awana Missionary, the default values of Supply Orders and a place for Notes. Some of the information is for reference purposes only. The fields in these tabs are pretty self-explanatory.

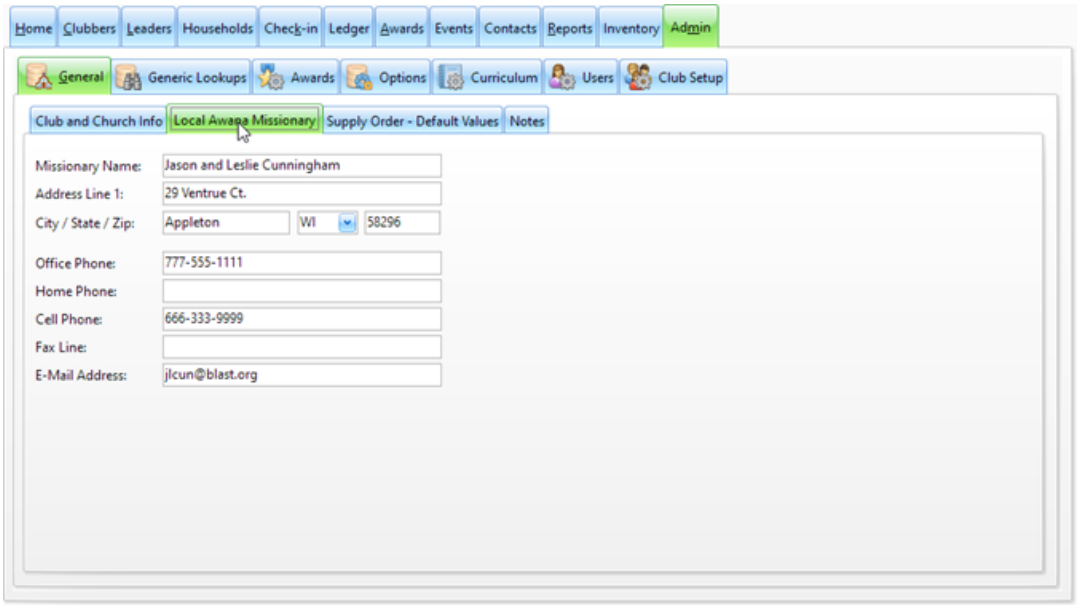
Club and Church Info

The church's contact information given on this page is used when generating reports and creating orders.



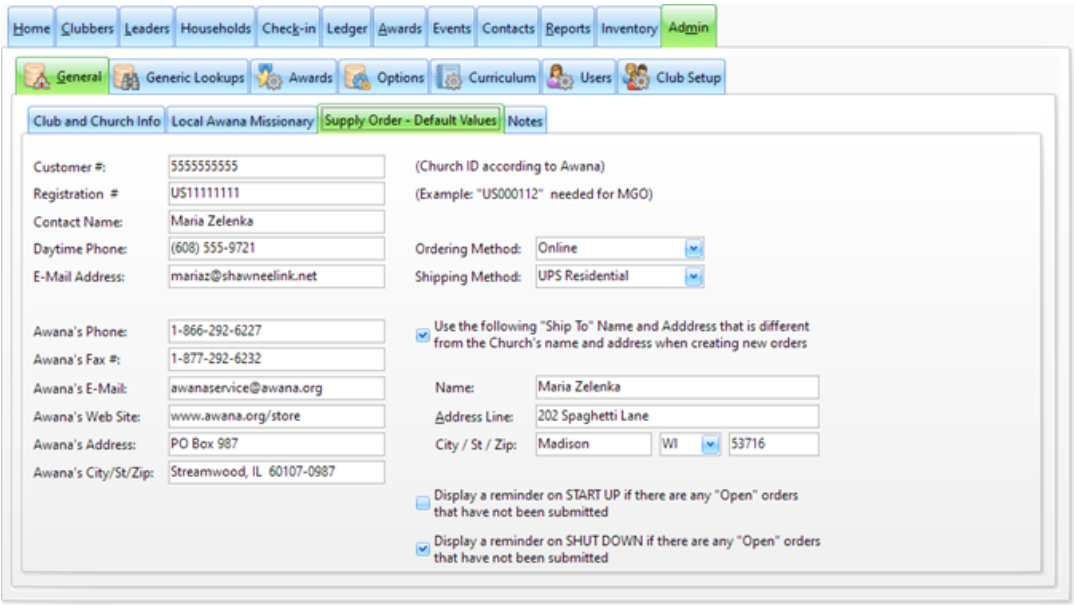
Local Awana Missionary

The Awana Missionary information is for reference.



Supply Order - Default Values

This information is used when creating orders from the Inventory Module.

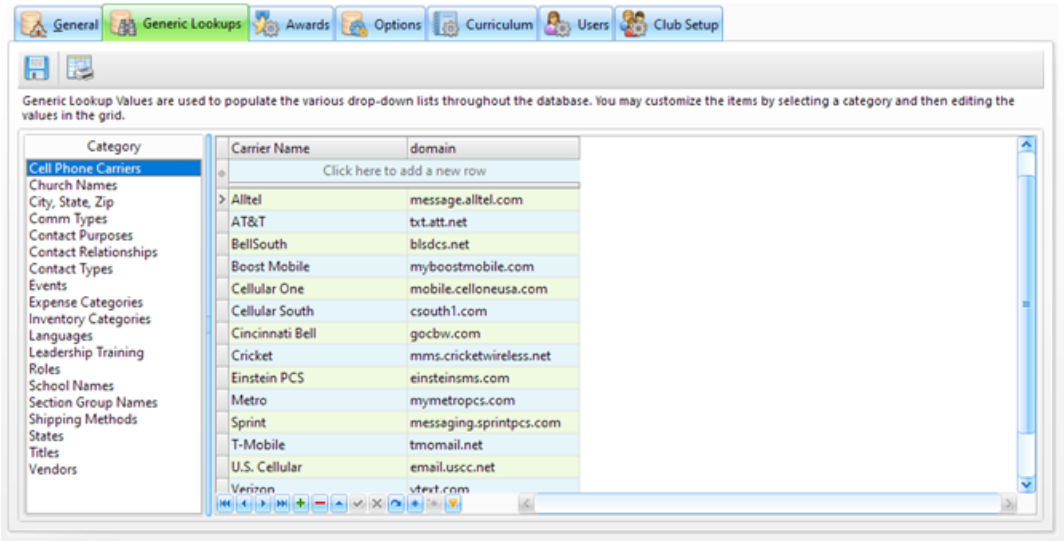


Notes

This page is for keeping any additional or miscellaneous information you need to track.

18.2 Generic Lookups

The Generic Lookups tab contains a list of categories of drop-down lists used throughout the Windows App. Select a category on the left to display the selection options on the right.



- Use **Click here to add a new row,** or the **'+' (plus)** below the grid, for a new record. In the blank row, type the new value then press **Enter** or click the **checkmark** at the bottom of the grid.
- Use the **'-' (minus)** below the grid to remove a record. Click **OK** to confirm deletion.
- To modify a record, select the value and type the new value. Press **Enter** or use the **checkmark** to accept the changes. Use the '**X**' to cancel the changes.

18.3 Awards

The Awards tabs indicate the awards that trigger for handbook completion, or by attendance or event participation. These generally don't need to be modified. In the rare case that updates are needed, follow the instructions below.

If an award item isn't in the drop-down list, open the corresponding item in the Inventory Module and ensure the **Use this item as a choice in any AWARD related drop-down list** is selected. Also, if needed, select **This item represents a Book-level Award** below that.

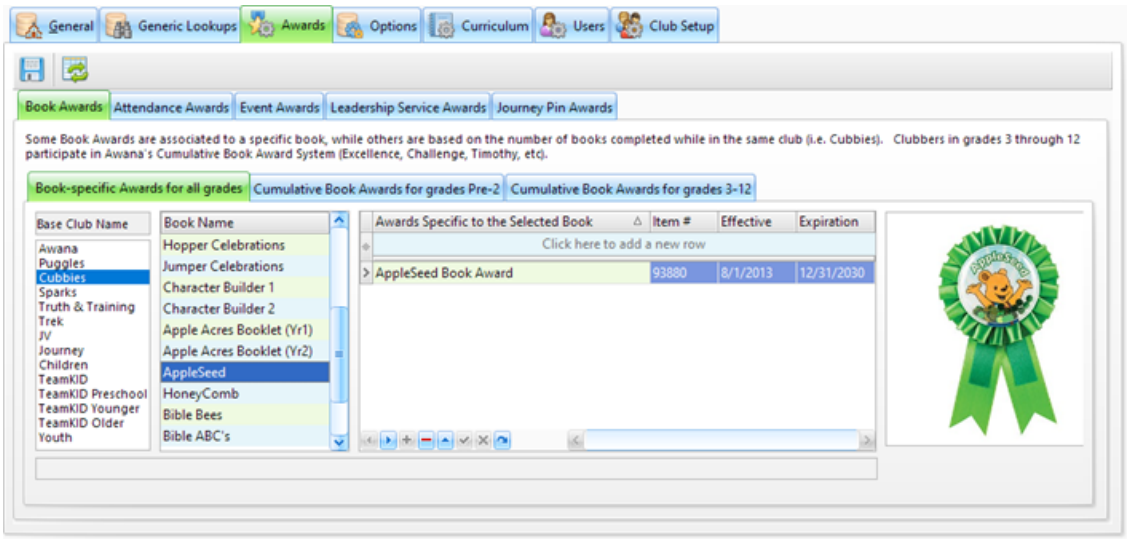
If your club gives awards that are different than those purchased from Awana Clubs International, add those items to your inventory then refer to them as instructed below.

Book Awards

This tab manages the awards that members earn when a handbook is completed. Some book awards are associated with a specific book, while others are based on the number of books completed.

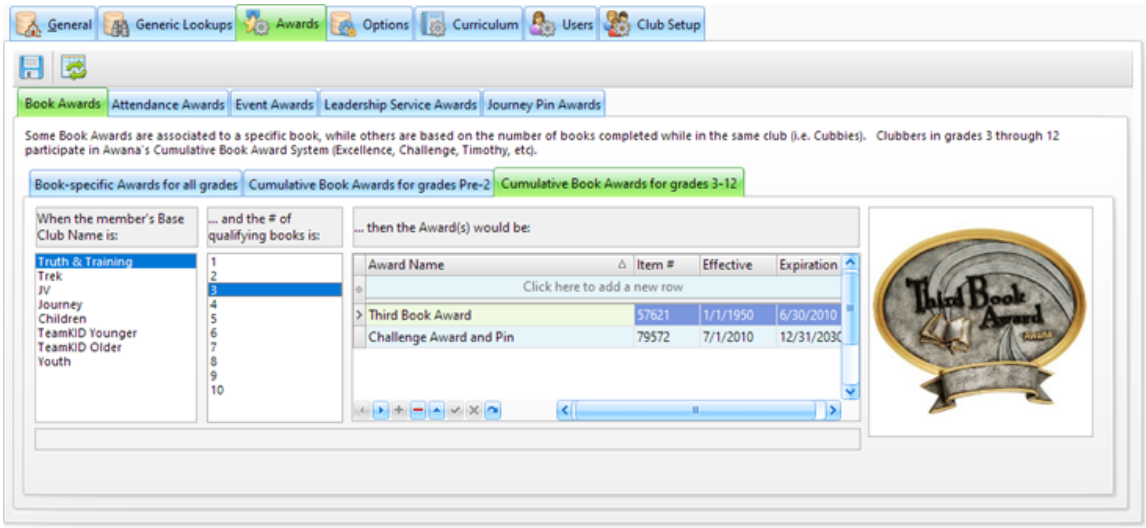
Book-specific Awards for all grades

This tab manages awards that are related to a specific handbook. For each **Base Club** selected, the associated books are listed. When a **Book Name** is selected, the associated awards are displayed. Use the buttons below the grid to add, remove or modify these awards.



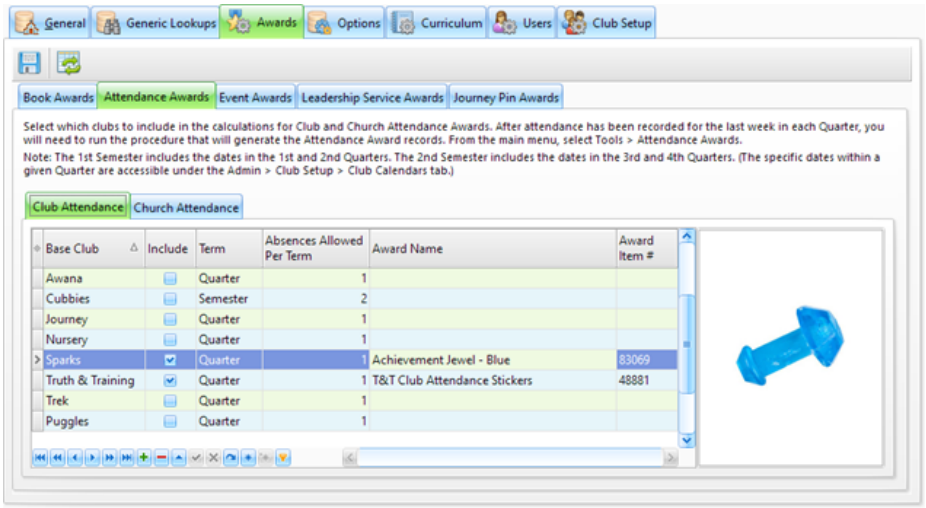
Cumulative Book Awards for grades Pre-2 (& 3-12)

When a book award is not associated with a particular book, but with *how many* books have been completed, the award association should be done on one of these pages. Select the **Club Name** and **# of qualifying books** then add, remove, or modify the awards in the grid on the right.



Attendance Awards

This tab manages the awards given to clubbers when they attend Awana or Church consistently. The awards are generated by using **Tools > Attendance Awards** from the Main Window's menu bar. The grids in both the **Club** and **Church** tabs work the same way but refer to different awards.

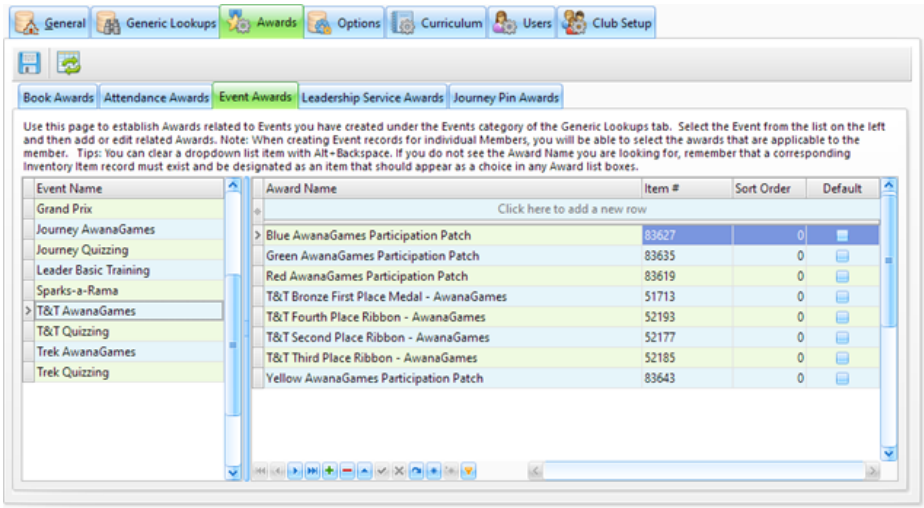


- Check the box next to each **Base Club** to **Include** it in the calculations for Attendance Awards.
- Club Attendance awards are normally given Quarterly and Church Attendance awards are given per Semester (every two quarters), but the **Term** can be changed as needed.
- Set the number of **Absences Allowed Per Term**.

- Select an **Award Name** from the drop-down list by scrolling or typing the name. The **Award Item #** will be filled in automatically.
- Clubs can be added or removed by using the buttons below the grid.

Event Awards

This tab manages awards earned by clubbers who participate in an event. The list of events is determined by Generic Lookups > Events. Select an event, then use the grid on the right to add, modify, or remove associated awards. These awards will appear as options to select in the Event dialog when using the Event Module.



Leadership Service Awards

This tab provides a setting for the number of times a leader must attend to earn a full service year credit (and count toward a Service Pin). The default is 24, but can be changed.

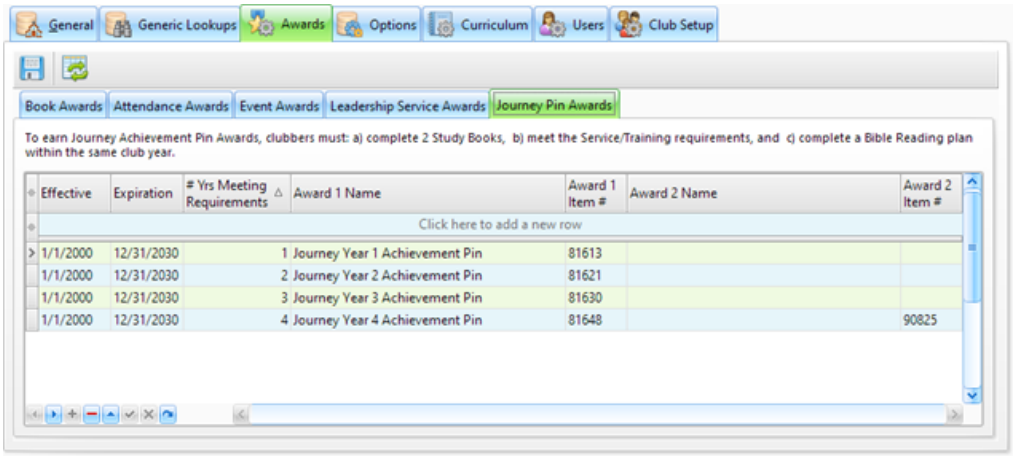
This requirement is evaluated each time a leader is marked 'present'. If the leader meets the attendance requirement, the Leader Service History record for the current club year is updated to show the service "counts" for 1 year of service and the leader qualifies for the Service Pin Award.

Journey Pin Awards

Journey clubbers earn Achievement Pin awards for completion of requirements during each year in Journey. This is independent from the cumulative book awards (Excellence, Timothy, etc.). This tab provides the details for these awards.

> The requirements in a given club year have changed over time. For a while, there were 2 Study books that needed to be completed along with Bible Readings and Service/Training items. Later, the curriculum returned to a single handbook. The database has been updated to handle those changes, but given the number of ways an Awana club can implement the changes, there could be clubbers whose time in Journey spans the change and makes evaluation difficult. You should be aware of the specific situation for any given clubber to verify all requirements set by Awana Clubs International are met.

The grid includes details for the awards based on credits for each year the requirements are met. It is similar to the **Cumulative Book Awards** tab, but is limited to completed Journey items. Under the older curriculum, completion of 2 Study guides and a Bible Reading plan (which includes the Service/Training items) counts as 1 year credit. Under the newer curriculum, handbooks include the Bible Reading plan and the Service/Training items so count as 1 year credit without additional requirements. The relevant pin is awarded based on the total number of credits a clubber has earned.



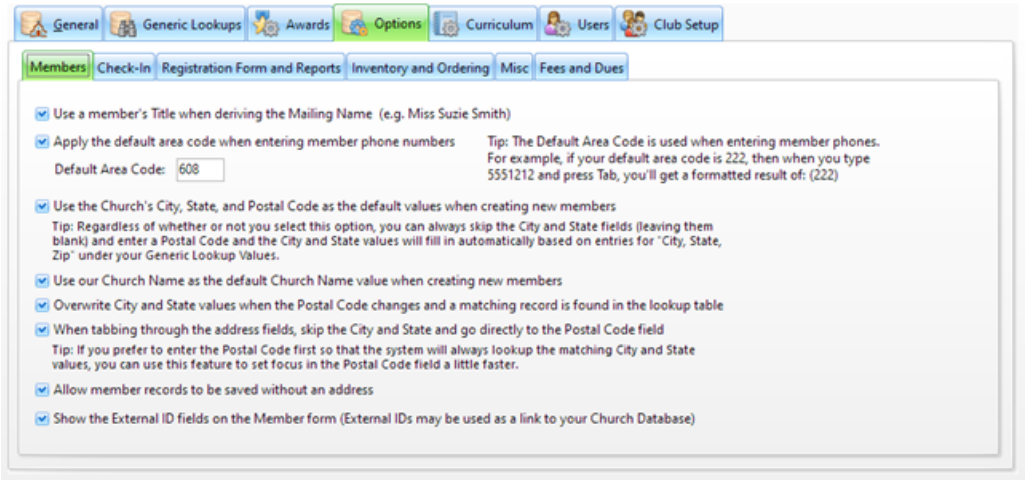
18.4 Options

The Options tab provides a variety of customizations. These options have defaults that reflect the most common uses among Awana programs, but allow changes to meet specific needs.

> When getting started, if all of the options are a bit overwhelming, just start with the defaults. If you ever wish something was done differently, check back here to see if it can be changed!

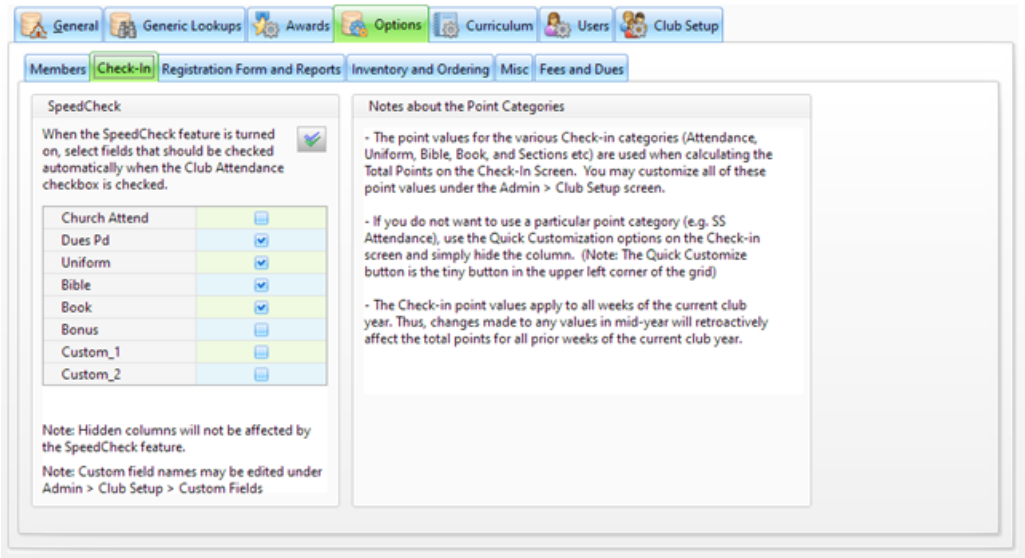
Members

This tab provides options related to Member windows.



Check-in

This tab provides options that deal with the Check-in Module.



Registration Form and Reports

This tab provides options related to the Registration Forms. There are several tabs. The Clubbers and Leaders Registration Forms can be customized individually. If the **Clubbers / Leaders** radio button is available, use it to switch between each form.

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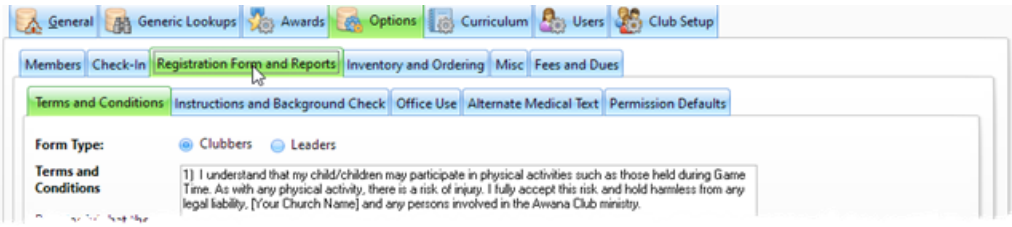
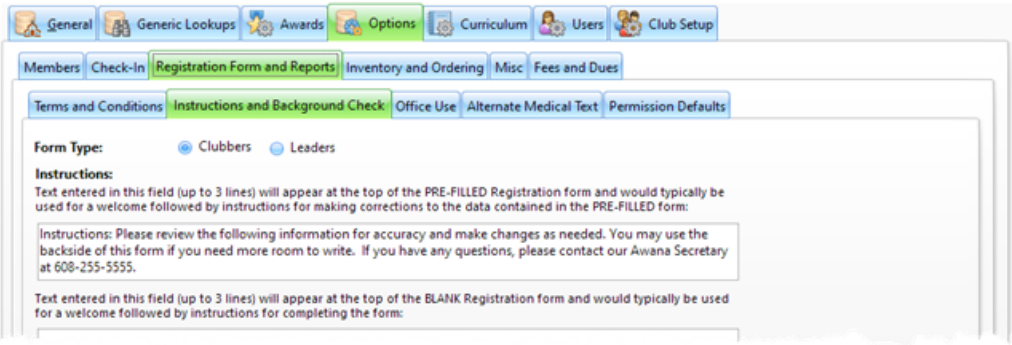
Terms and Conditions

This tab provides customization of the text in the Terms and Conditions section of either the Clubbers or Leaders Registration Form.



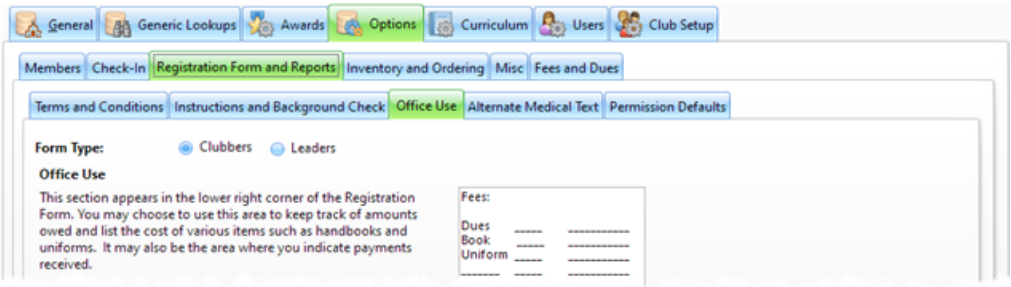
Instructions and Background Check

This tab allows personalization of the instructions or background check notices to be included.



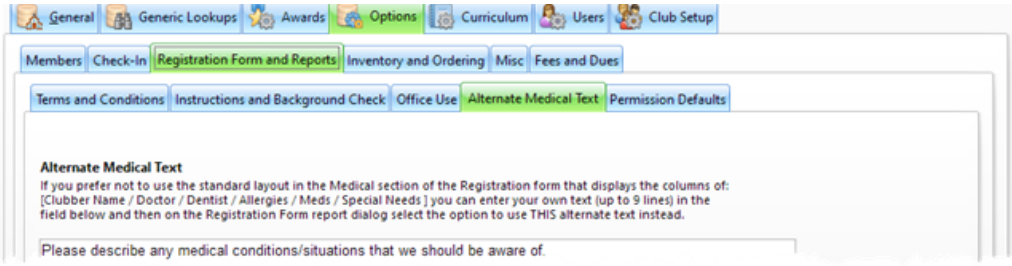
Office Use

This tab allows customization of the office-related information to include on the Registration Form.



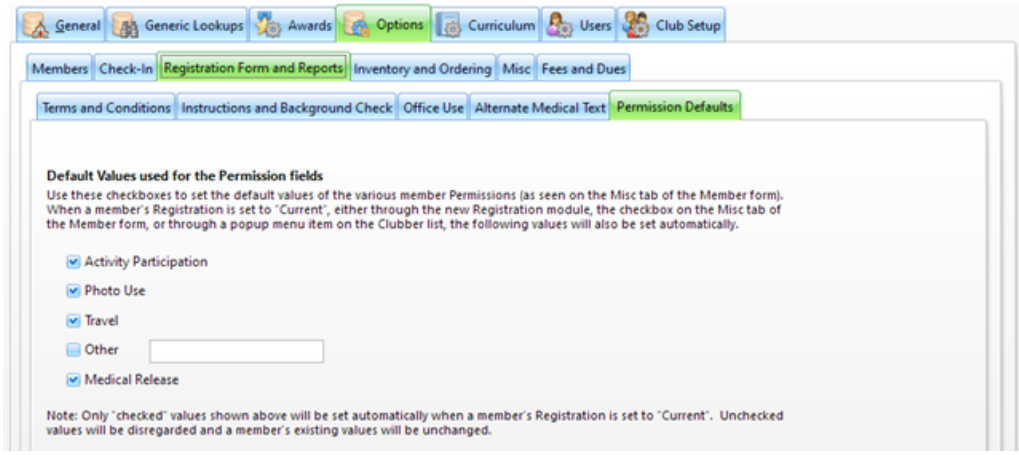
Alternate Medical Text

This tab provides the option to use a customized alternate text on the Clubber Registration Form.



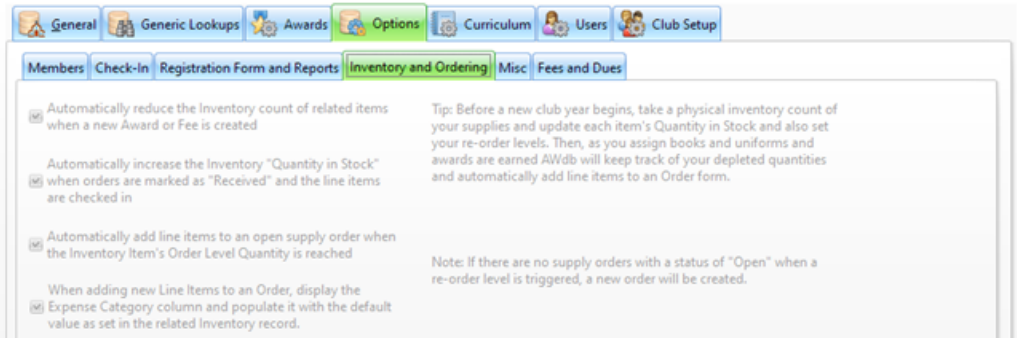
Permission Defaults

This tab allows selection of which permission fields to update (on the Member form's Misc. tab) when the registration is set to 'current'.



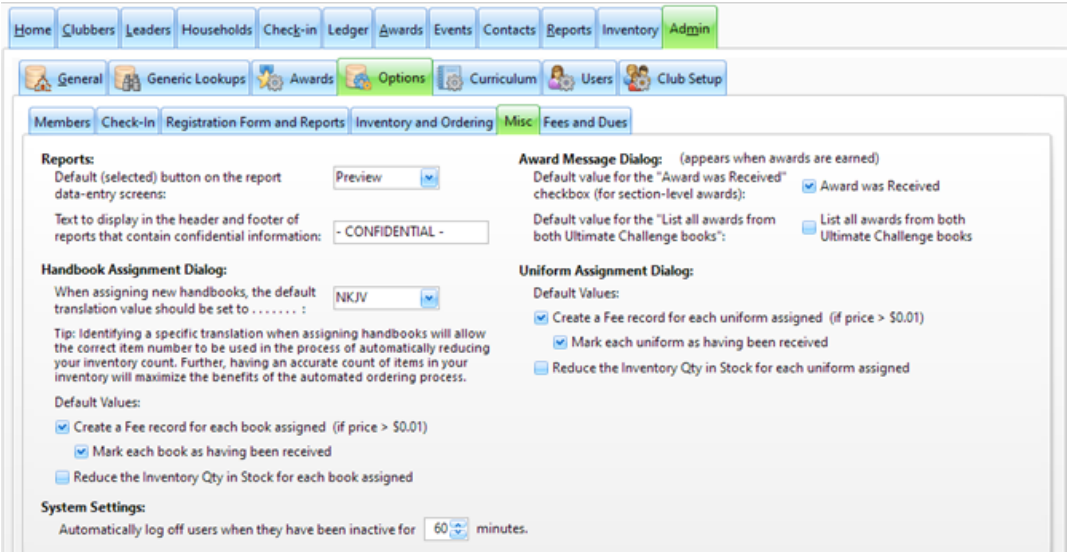
Inventory and Ordering

[These are all currently set to 'on' and the screen is read-only.]



Misc

This tab includes various options that were not included in the other tabs.

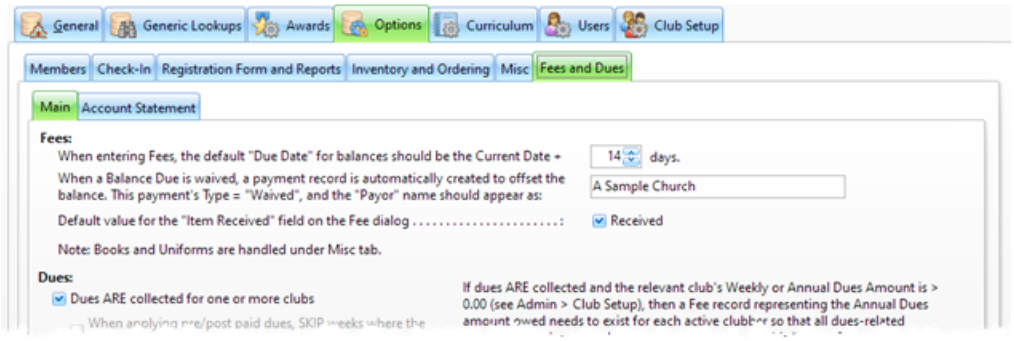


Fees and Dues

This tab contains two sub-tabs:

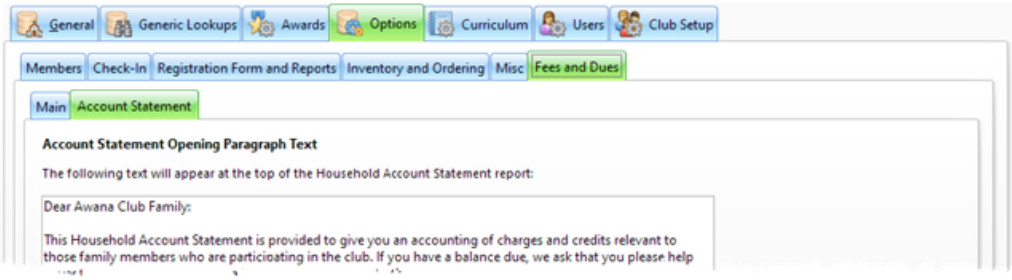
Main

This tab provides options related to fees and dues.



Account Statement

This tab allows customization of the text used at the top of the Household Account Statement.



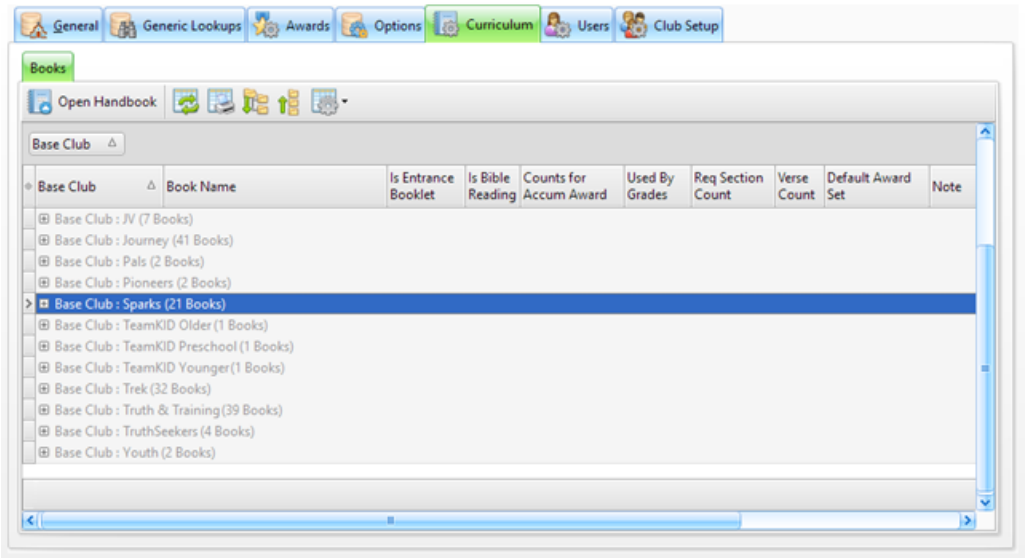
18.5 Curriculum

The Curriculum tab displays the handbooks and other curriculum items used in Awana. Besides the normal grid manipulations, the following buttons are available on the toolbar:

	Open Handbook	Opens the Generic Handbook Window to view or modify information about the selected generic handbook.
	Grid Tools	Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data.

Books

This tab displays the various handbooks used by each base club. To view a **Base Club's** handbooks, click the **'+'(plus)** toggle at the left of its row to expand the group. To view or modify a handbook's details, either double click a handbook or select the row then click **Open Handbook** to open the generic handbook window.



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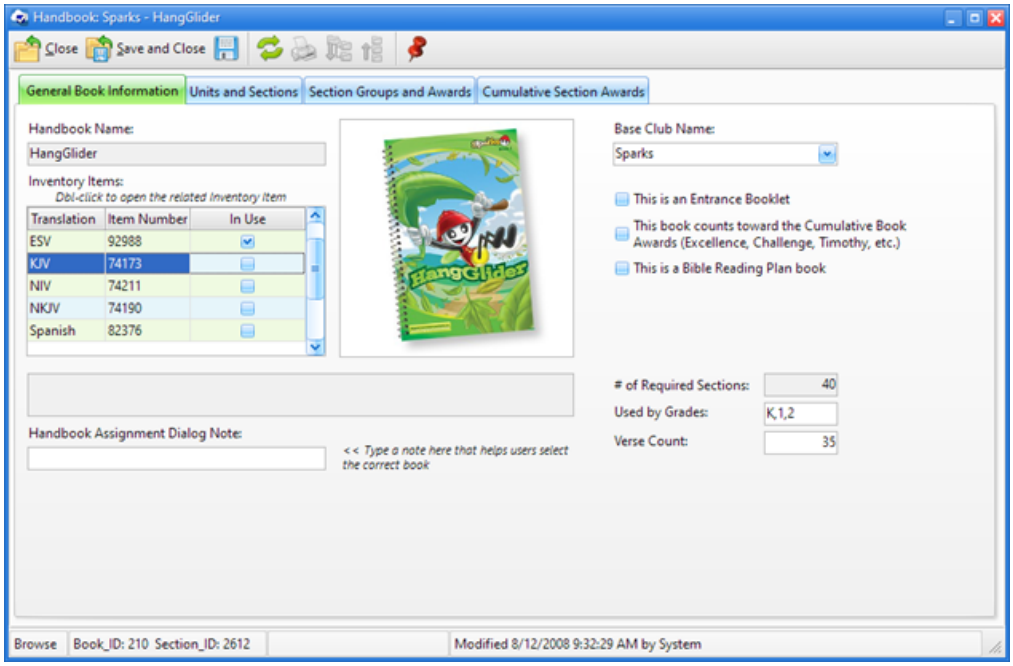
18.5.1 Generic Handbook Window

Opening a book from the **Admin > Curriculum** list opens the Generic Handbook window. It can also be opened by clicking the **Open Handbook** button on the **Member Window > Handbooks** toolbar. This form displays the detailed data for each handbook that can be assigned to members. It has four tabs, as described below.

General Book Information



Under the **General Book Information** tab, some fields are read-only and are presented for informational purposes. Though changes are rarely needed, the following fields do allow editing:

- **Inventory Items** - lists inventory records for the various translations of the handbook. Any translations "**In Use**" are included in the initial display of books in the Handbook Assignment dialog.
- **Handbook Assignment Dialog Note** - this appears in the Handbook Assignment dialog. It can help users make the correct selection, especially if there are multiple revisions of the same book.
- **Base Club Name** - the PRIMARY base club that uses the book.
- **This is an Entrance Booklet** - indicates the book is used as an entrance booklet.
- **Counts toward the Cumulative Book Awards** - indicates the book should be counted toward major book awards, such as Excellence, Timothy, Citation, etc
- **This is a Bible Reading Plan book** - used by Trek or Journey to track completion of reading through the books of the Bible
- **# of Required Sections** - indicates how many required sections are in the book
- **Used by Grades** - tracks which grades use this book.
- **Verse Count** - shows the number of verses included in the required sections of the handbook.

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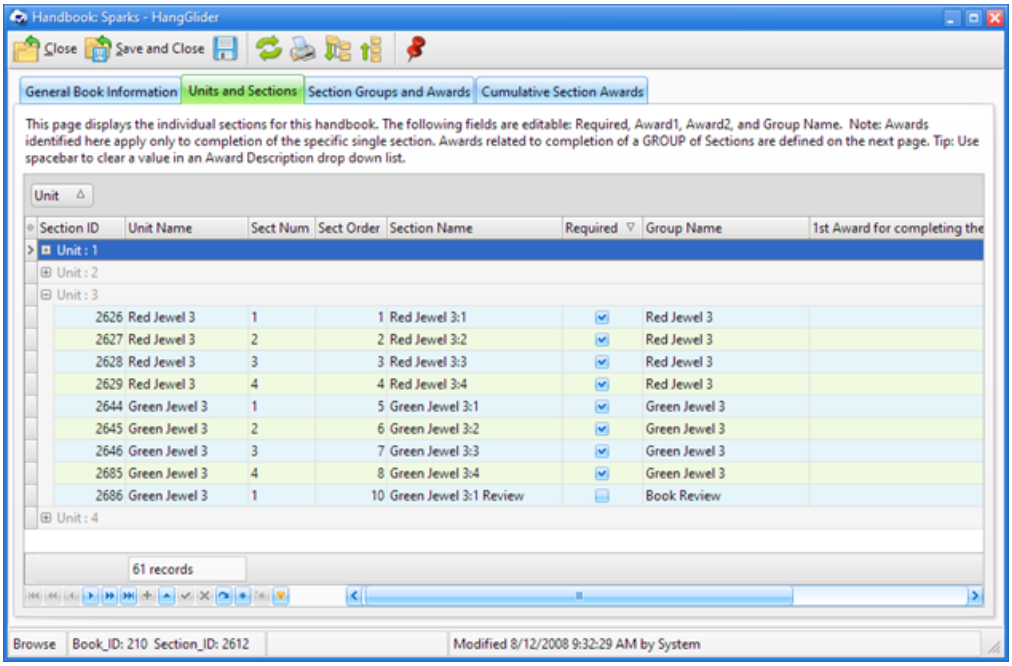
Units and Sections



The **Units and Sections** tab displays all the handbook sections in the book. The following fields are editable:

- **Required** - required sections appear on the "Required" sections tab wherever handbook sections can be marked as completed, such as the handbook panel of the Check-in module, or the Handbook tab of the Member form. Sections that are NOT required are considered Review or Extra Credit sections, and appear on the Review/Extra Credit tab.
- **Group Name** - indicates what group the section belongs to. We recommend not making changes to the Group Name values as this might impact award triggers.

  Changing the required status of a section from 'Yes' to 'No' does require removing the Group Name for that section so the database does not include that section when evaluating the sections for the group award. To remove the Group Name, click into the cell and then press the Delete button.

- **1st Award for completing the Single Section / 1st Award Item#** - award to trigger when the specific single section is completed. Generally only Cubbies have values here because they get a sticker for everything they do.
- **2nd Award for completing the Single Section / 2nd Award Item#** - works the same as corresponding 1st Award fields but allows a second award to be triggered when the single section is completed.

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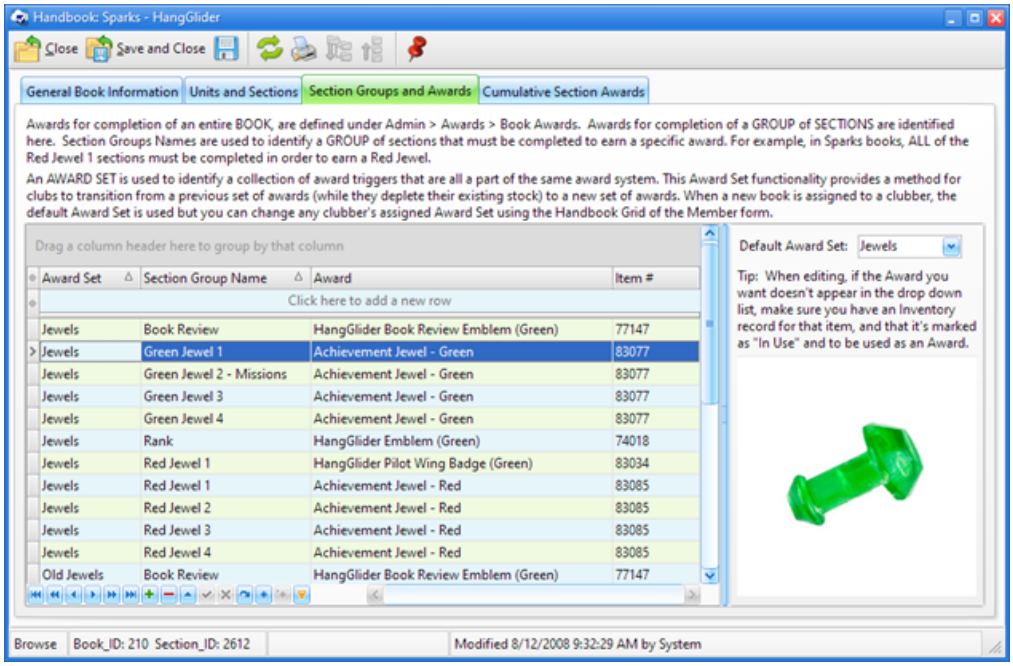
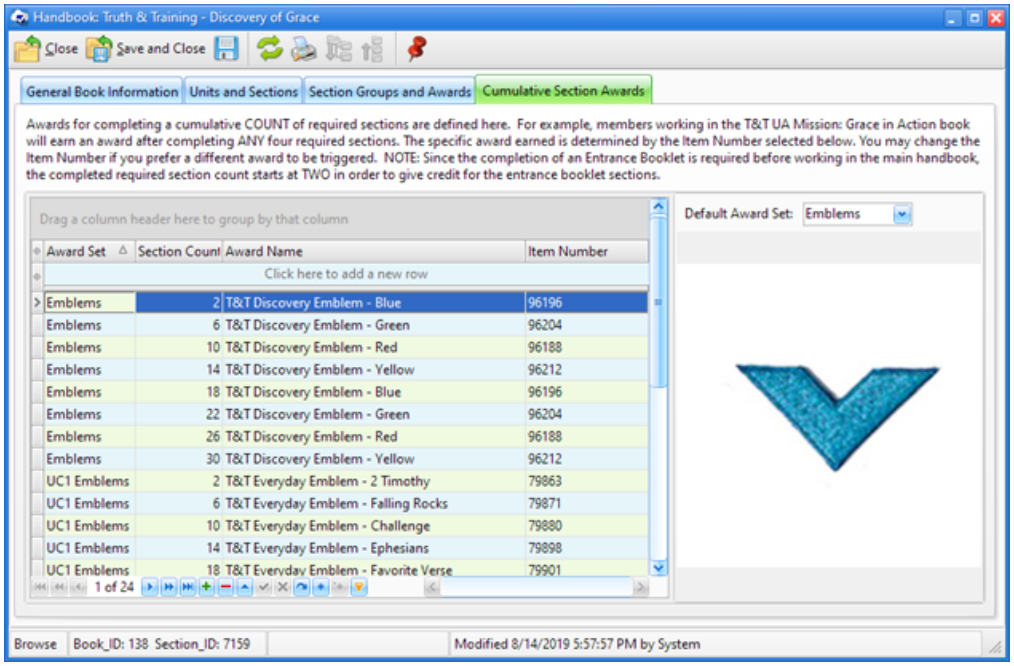
Section Groups and Awards



The **Section Groups and Awards** tab includes a grid containing the records used to trigger awards for a group of sections that have been completed (for example all of the Green Jewel 3 sections). Under the **Units and Sections** tab, handbook sections have a **Group Name**. When all of the sections with the same Group Name are completed, the corresponding award (as defined by any records in this grid) is triggered. When using the common award system recommended by Awana, these should never need to be changed.

The **Default Award Set** might have more than one choice. This field allows selection of which Award Set to use when assigning books. For many years the T&T club used the oval badges with the bubble-like seals. They later changed to the Streamwood badge and Bones for 3rd and 4th graders and various patches for 5th and 6th graders. Choosing the default award set allows use of a supply of older awards before switching to a new award set. The default award set here determines the award set to use when a book is assigned. Award sets for individual member's books should be managed by opening the Member record and clicking the Handbook tab and then clicking in the Award Set field of the assigned handbook.

Cumulative Section Awards



The **Cumulative Section Awards** tab includes a grid containing the records used to trigger awards based on a set number of sections being completed (for example, any 4 sections in Grace in Action). When the section count is met, the corresponding award (as defined by any records in this grid) is triggered.

The **Default Award Set** might have more than one choice. This field allows selection of which Award Set to use when assigning books. The default award set selected here determines the award set to use when a book is assigned. Award sets for specific books for specific members should be managed by opening the Member record and clicking the Handbook tab and then clicking in the Award Set field of the assigned handbook.

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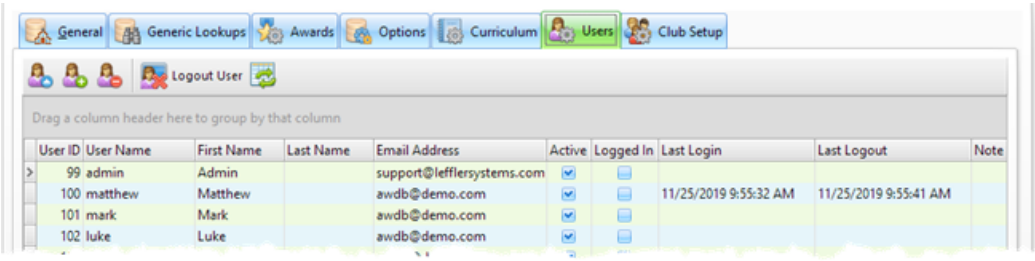
18.6 Users

The Users tab manages the names and account information of those authorized to use the web database. The first admin user is created during the initial setup process. The admin can then set up additional user accounts.

We recommend creating as many user accounts as there are individual persons who will have access to the database. Each user will be able to select a unique style (skin) and have saved customized grid layouts. Most records are user time-stamped when they are created and/or modified. Having separate user accounts for each person provides a way to investigate changes made to the data.

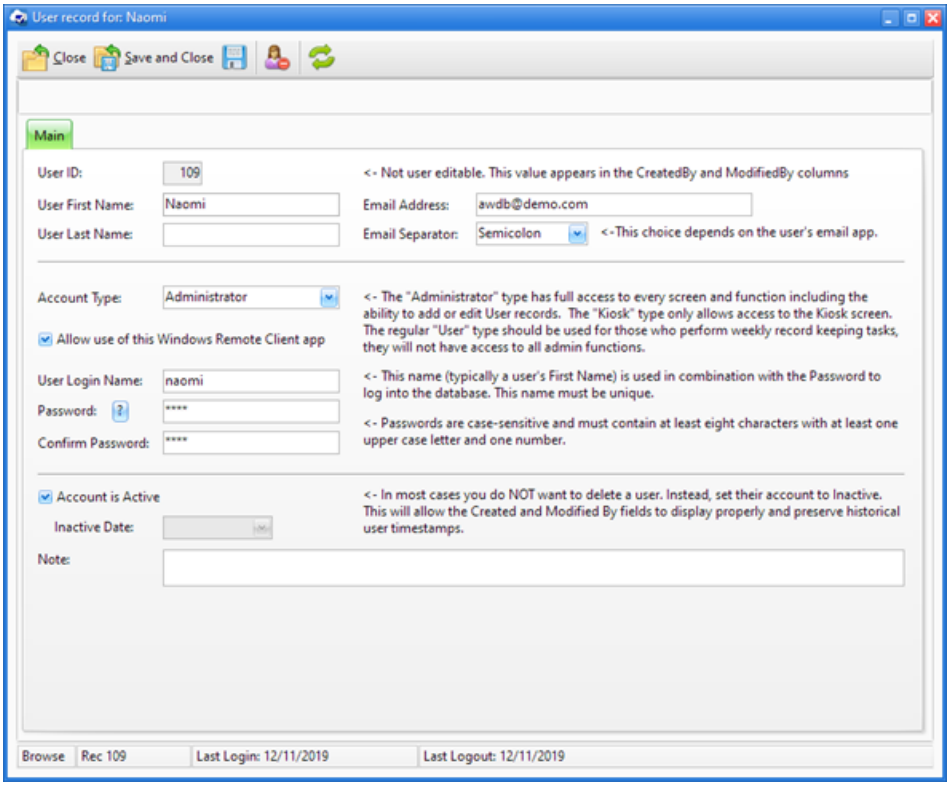
Do NOT use generic user accounts that are shared by more than one person. Otherwise, users could overwrite other user's settings and grid layouts. You will also lose valuable information related to creation and modification of records.



Icon	Action	Description
	Open User	Opens the selected user in the User Account dialog. (Pressing the **Enter** key with a row selected or double clicking the row also opens the user record.)
	New User (Ctrl-N)	Opens the User Account dialog with blank/default values to create a new user.
	Delete User (Ctrl-D)	Removes the selected user. There must always be at least one active admin account. Trying to remove the last one will result in a reminder. Instead of deleting user accounts, we recommend setting the **Active Status** to **No** to preserve historical user timestamps.
	Log User Out	Logs the selected user out of the database.

User Account dialog

Creating a new User record or opening an existing record opens the User account dialog.



The following fields are shown on the Main tab:

- **User ID -** a system assigned ID. This is a read-only field.
- **User First Name, User Last Name, Email address** -
- **Email Separator** - determines the separator to use between e-mail addresses during the **Gather E-mail Addresses and Textible Phone Numbers** procedure. Choose either semicolons or commas, depending on the e-mail application requirements.
- **Account Type -** determines access to some parts of the database. Select "Administrator", "Kiosk" or "User" from the drop-down list. An account type of "Administrator" has full access to every screen and function, including the ability to add or edit User records. An account type of "Kiosk" only allows access to the Kiosk screen. An account type of "User" has full editing privileges, but will not be able to view or access User records as well as some of the functionality under the Admin module. All users can change their own passwords by selecting **Tools** > **Change Password** from the Main menu bar.

  Access to the Windows App is controlled by Permission settings in the Browser app. Any person with a user account will be able to access the data through the Windows App unless you turn off the permission.

- **User Login Name -** name used to log in. We strongly recommend using the person's First Name for this. Generic names like "commander", "sparks", or "FBC" should **NOT** be used. The User Name is not case-sensitive so "Matthew" is the same as "matthew" as far as the log in screen is concerned.

- **Password -** password for the user to log in. The password IS case-sensitive, so "PassWord" is not the same as "password" to log in. Whatever the password is set to here, the exact same value must be entered on the log-in screen. **Don't use "awana" for your password, everybody guesses that one!**
- **Confirm Password -** confirmation of the password entered above.
- **Account is Active -** indicates the status of the user account. If a user no longer needs access to the database, instead of deleting the account, clear the box.
- **Inactive Date -** date the account became inactive.
- **Note -** any additional information or notes related to the user account.

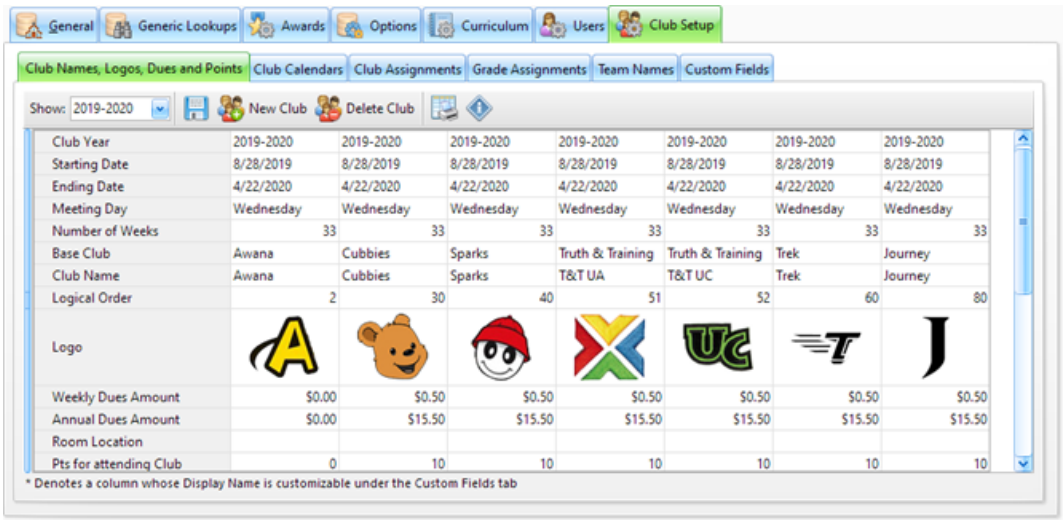
18.7 Club Setup

To setup a new club year, follow the instructions in the New Year Setup section before continuing here. Once the new year is setup, or if adjustments need to be made in the middle of a club year, continue to follow the instructions below. Each section below describes a Club Setup tab.

Club Names, Logos, Dues and Points

This tab provides an overview of the settings for each club. It displays the general club information, such as the Start and End Dates, the Weekday each club meets, Weekly and Annual dues, and Point Values.

Make sure the correct new **Club Year** is selected in the main toolbar and in the Club Setup Tab.



Club Year	2019-2020	2019-2020	2019-2020	2019-2020	2019-2020	2019-2020	2019-2020
Starting Date	8/28/2019	8/28/2019	8/28/2019	8/28/2019	8/28/2019	8/28/2019	8/28/2019
Ending Date	4/22/2020	4/22/2020	4/22/2020	4/22/2020	4/22/2020	4/22/2020	4/22/2020
Meeting Day	Wednesday	Wednesday	Wednesday	Wednesday	Wednesday	Wednesday	Wednesday
Number of Weeks	33	33	33	33	33	33	33
Base Club	Awana	Cubbies	Sparks	Truth & Training	Truth & Training	Trek	Journey
Club Name	Awana	Cubbies	Sparks	T&T UA	T&T UC	Trek	Journey
Logical Order	2	30	40	51	52	60	80
Logo							
Weekly Dues Amount	$0.00	$0.50	$0.50	$0.50	$0.50	$0.50	$0.50
Annual Dues Amount	$0.00	$15.50	$15.50	$15.50	$15.50	$15.50	$15.50
Room Location							
Pts for attending Club	0	10	10	10	10	10	10

- The first six rows contain information set by the New Year Setup process and are read-only.
- **Club Name -** Click in the cell to edit it. When the change is saved, all records using the old club name will be updated to the new name.

Keep club names brief so they will be easier to read in the narrow columns of the grids.

- **Logical Order -** numeric value to ensure that club names are sorted in logical order rather than alphabetical. (Most users prefer a logical order of: Puggles, Cubbies, Sparks, T&T, Trek, Journey, instead of: Cubbies, Journey, Puggles, Sparks, Trek, T&T.)
- **Logo -** personalize the logos by copying any image into clipboard memory then pasting it in the image cell or by loading an image file. To activate the image pop-up menu, first click in an image cell, then follow with a right click in the same cell.
- **Weekly Dues Amt -** default amount credited toward dues when the **Dues Paid** check box on the Check-in grid is marked.
- **Annual Dues Amt -** default amount for a new Fee record representing Annual Dues.

A new Annual Dues fee record is created automatically when a clubber's Registration becomes current or when a Dues Paid check box is checked the first time.

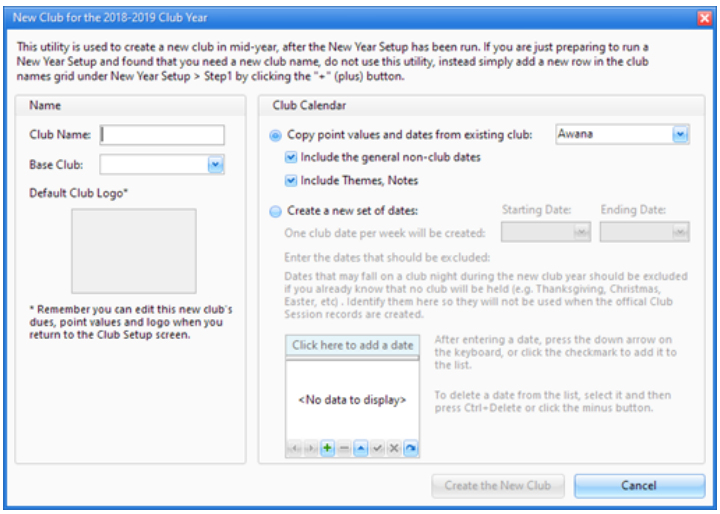
If dues are NOT collected, enter "$0.00" for both weekly and annual dues. If dues ARE collected, but there are no weekly dues, hide the **Dues** header band on the Check-in Module's grid so it does not cause confusion and take up valuable space.

- **Room Location -** room number or location where the club meets for handbook time.
- **Points for: attending club**, **attending church** or **Sunday School, wearing a uniform**, **bringing a Bible, bringing a handbook**, **paying weekly dues**, **bringing a visitor**, **giving an offering,** earning a **Bonus,** two **Custom** fields, and **Required section** or **Extra Credit section** completion - values credited to a member when the various items are marked (on the Check-in grid or the Attendance tab of the Member record).

Actions

- **Save** - saves changes and applies them to the database. Be sure to click this to save changes!!
- **New Club -** for mid-year club additions; opens the New Club dialog:

If you are just preparing to run a New Year Setup and need to create a new club name, do not use this dialog. Instead, add a new row in the club names grid in **New Year Setup** > **Step 1**.



Under the **Name** section, enter the new **Club Name** and select the appropriate **Base Club**.

Under the **Club Calendar** section, choose to:

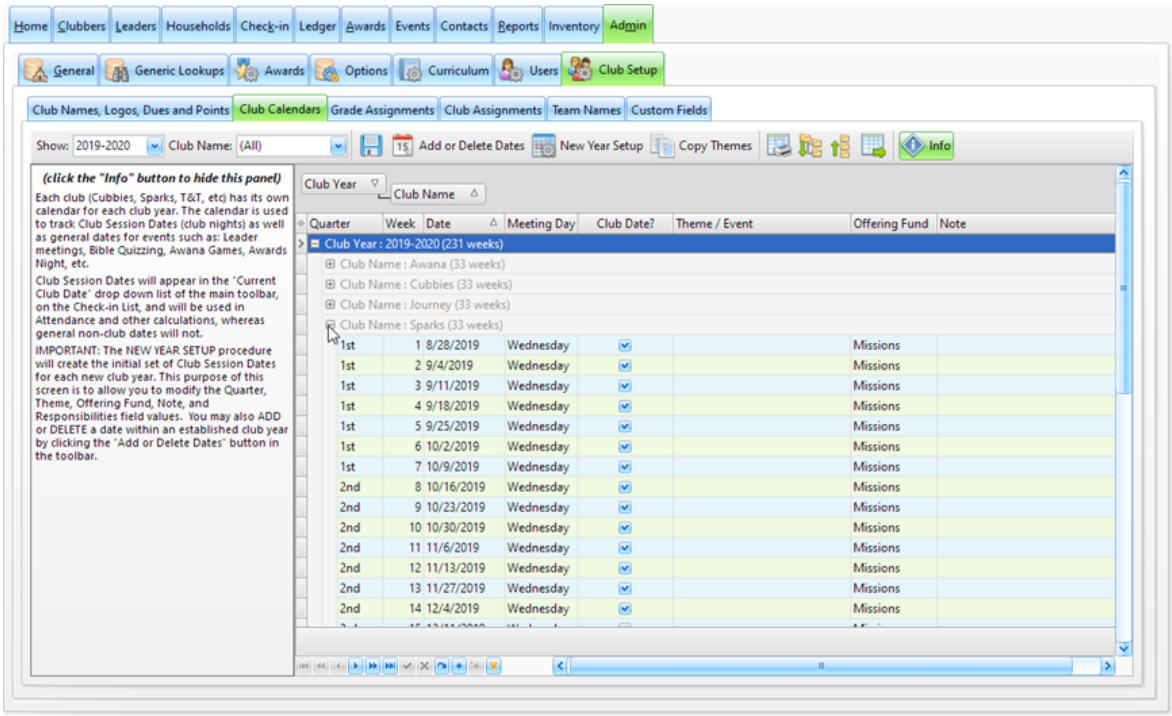
- **Copy point values and dates from an existing club**, with additional options for **including non-club dates** and/or **include Themes, Notes**
- **Create a new set of dates:** enter **Starting** / **Ending** dates and **dates to be excluded**.

- **Delete Club -** Removes the selected club.

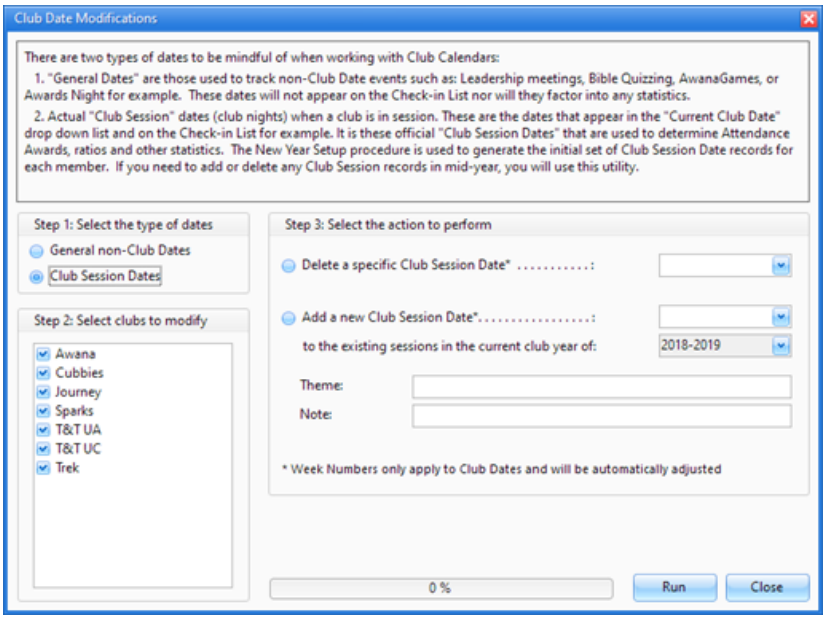
A club may only be deleted if no members are assigned to it.

Club Calendars

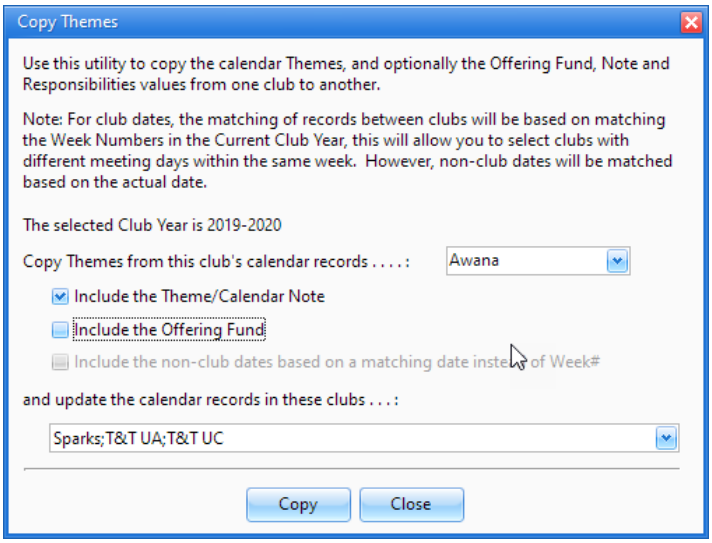
Use this page to review and edit each club's calendar for the current club year.



- To access a particular club's calendar, click ⊞ next to **Club Year** and then click ⊞ next to the desired **Club Name**. Each club has its own calendar for each club year.
- **Quarter**, **week**, **date, meeting day, club date or non-club date** - only the Quarter can be edited. The initial Club Session Dates are created by the New Year Setup procedure. Dates cannot be added or deleted directly in the grid. The **Add or Delete Dates** button in the toolbar opens the Club Date Modifications dialog:



- **Theme/Event** - relevant to the specific date. Click in the cell and type the details. If multiple clubs use the same themes, enter the themes for one club (such as the standard "Awana" club), then click **Copy Themes** on the toolbar to open the **Copy Themes** dialog:



Choose a club to **Copy Themes from;** optionally include **Theme/Calendar Note; Offering Fund;** and/or **non-club dates,** then choose the club(s) to **update the records.**

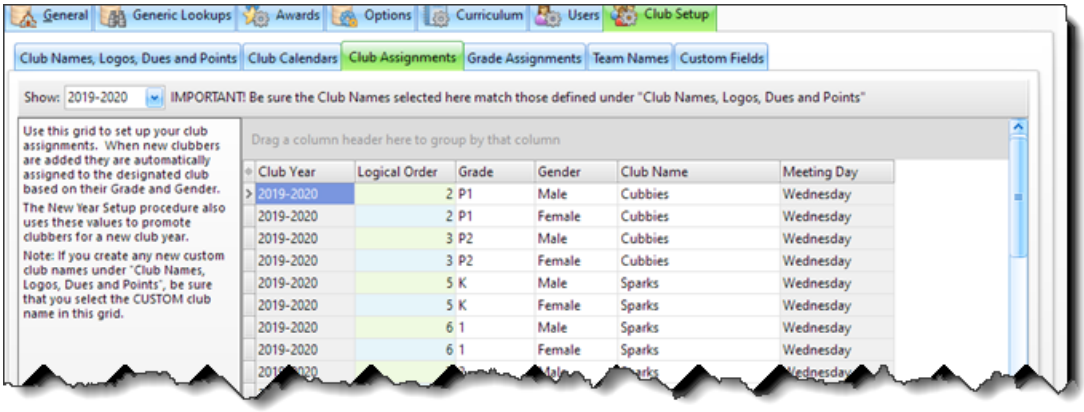
The Copy button is disabled until club names are selected to copy form and copy to.

- **Offering Fund** - indicates the designated use of offerings for the specific date, such as: Missions, Adopt-a-Club, Scholarships, etc. Make the column visible on the Check-in grid and any money entered will be credited to the particular fund designated for the given week.

- **Note** - any additional information

Club Assignments

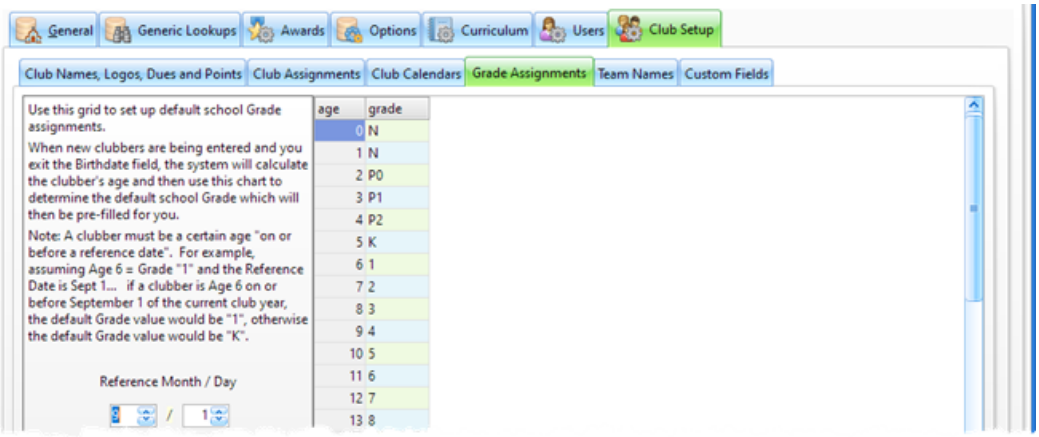
This tab shows the records the database uses when automatically assigning clubbers to a club based on grade and gender. These are defaults. A club assignment can be changed in the individual's member record.



- If a gender or grade has been incorrectly associated to a specific club, click the cell under the **Club Name** column and select the correct club name from a drop-down menu.

Grade Assignments

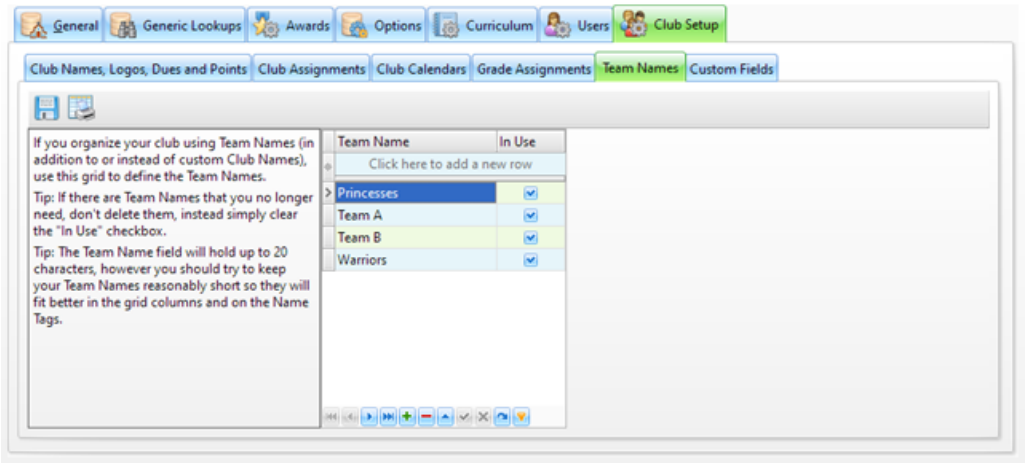
Use this page to assign default grades based on a clubber's age. The grade assignments are the defaults. A clubbers's grade can be changed on the member's record.



- **Reference Month / Day** - serves as the "cutoff point" for each grade division. The member must be the age specified in the grid by the reference month/day to be assigned to the listed grade.
- **Grade** - default grade assignment for a clubber with the specified age.

Team Names

If your club is organized using team names (in addition to or instead of custom club names), use the **Team Names** page to define the team names related to each club.

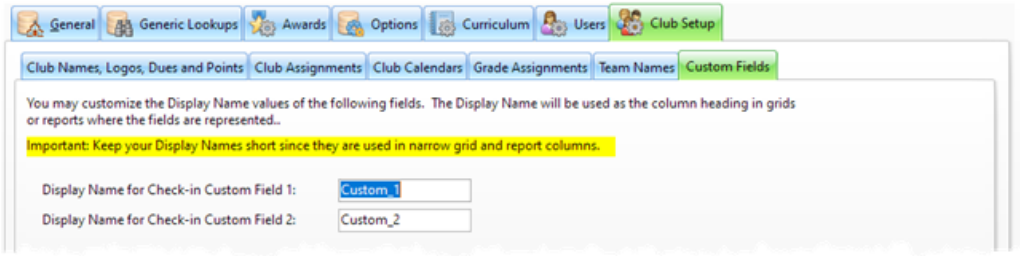


- To add a Team: click on the empty row at the top of the grid or click **'+' (plus)** below the grid. Enter the **Team Name,** Save the record by clicking the checkmark at the bottom of the grid.

Historical team names can't be deleted. To remove a team name from the current drop-down selections, uncheck the 'in use' box.

Custom Fields

There are two customizable columns that can be used on the Check-in grid and the Check-in and Progress Report Worksheet. Set each column's **Display Name** here.



The fields labeled "Custom1" and "Custom2" can be defined specifically for your club. Keep the display names short since they are used in narrow grid and report columns. To assign the related point values, go to the **Club Names, Logos, Dues and Points** tab (also under **Club Setup**).

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Chapter 19

19 Approved Workman Terminology

Awana – In the context of entering records in the database and assigning Club Names, there is a generic "Awana" club name in addition to the other club names like "Cubbies", "Sparks", "T&T", etc. This generic "Awana" club name is intended to be used for leaders who do not serve exclusively in a specific club; for instance, a Commander, Pastor, Games Director, Song Leader, Secretary etc. If a leader is serving in a specific club (i.e., a Sparks Director) it is appropriate to use a specific Club assignment.

Awana® Clubs International – The central organization responsible for creating, organizing and running the Awana program. If you have an Awana program at your church, you must be chartered with Awana Clubs International.

Awana Program – The running of a chartered club from Awana® Clubs International by a local church. (Not the AWdb software program.)

AWdb – An abbreviation for the Approved Workman Database software application. Also AW for Approved Workman.

Club – Individual clubs separated by age/grades and distinguished by uniform and curriculum levels/ design. There are currently six clubs in Awana: Puggles, Cubbies, Sparks, Truth and Training (T&T for short), Trek, and Journey.

Club Dates – The dates on which an Awana program is scheduled to meet. For instance, if your Awana program meets on Wednesdays, the Club Dates should be mainly Wednesdays (with the exception of such Club Dates as Bible Quizzing, Awana Games, etc. which probably meet on weekends).

Member – A person involved in Awana, either as a **clubber** or as a **leader**.

Clubber – A child who regularly attends and participates in Awana.

Leader – An adult who helps in Awana after having gone through at least a preliminary training program and a certification test.

Leader in Training (LIT) – An adult or teen who has not gone through a training program. Usually teens must go through two years of training before taking a certification test. If Trek and Journey meet on a separate night from the rest of Awana, it is not unusual for those clubbers to volunteer in younger clubs such as Cubbies or Sparks. [Also referred to as Student Leaders.]

Section – In most Awana curricula, the books are separated into “sections.” A section is distinguished as what a clubber must complete all at once (for instance, a clubber must recite all verses within a section to the leader in one sitting, with a maximum of two prompts or helps), and usually is comprised of one to three verses, or a Bible Study or activity. Sections are known by specific names according to club: Cubbies have “Bear Hugs,” Sparks “Jewels”, and T&T “Discoveries.”

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Index

- A -

Admin
- Awards 193
- Club Setup 208
- Curriculum 201, 202
- Data Import 56
- General 190
- Generic Lookups 192
- New Year Setup 60
- Options 196
- SQL Workbench 58
- Users 206

Admin Module 190, 192, 193, 196, 201, 206, 208
Approved Workman Database
- configuring 208
- customizing 17
- downloading 10
- importing data 56
- installing 10
- logging in 14, 94
- setting up new club year 60
- supporting 12
- updating 11

Attendance 76, 97
Attendance Awards Tool 52
Awards 37, 52, 80, 134, 135, 193
Awards Module 134

- C -

Check-in Module 32, 115, 116, 119
Club Calendars 60, 98, 208
Club Logos 208
Club Store Tool 53
Clubbers Module 100
Contacts 82, 141, 142
Contacts Module 141
Custom Fields 115, 208
Customer support 12

- D -

Dues 35, 119, 208

- E -

E-mails 21, 54, 100, 104
Events 81, 138, 139
Events Module 138

- F -

Fees 24, 35, 83, 89, 123, 125, 127

- G -

Gather E-mail Addresses Tool 21, 54
Gather Textible Phone Numbers Tool 21, 54
Grids 39
- customizing visible columns 40
- display options 47
- exporting 46, 47
- filtering 41, 42
- grouping 44
- layouts 47
- printing 45
- searching 45
- sorting 39

- H -

Handbooks 27, 77, 120, 201, 202
Help Menu 64
Home Page 96
- customizing chart 97

Household Ledger 35, 89, 127
Household Module 112

- I -

Inventory 85
- initial setup 86
- placing an order 87, 185
- searching 55
- tracking 86, 178

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Inventory Items 178, 180
Inventory Module 178, 184
Inventory Orders 87, 184, 185
Inventory Quick Reference Tool 55

- L -

Leaders Module 104
Leadership 84
Ledger Module 123, 126
Login Dialog 14, 94

- M -

Main Window 50
  toolbar 64
Member Window 66, 67, 68, 71, 76, 77, 80, 81, 82, 83, 84
Members
  adding a visitor 33
  assigning handbooks 24, 27, 77
  assigning to a team 29
  assigning uniforms 24, 28
  checking-in 32, 115, 119
  contact information 21
  creating 20
  earning awards 37, 77, 120, 134
  earning points 36, 76
  managing photos 30
  marking attendance 76, 119
  marking sections 77, 120
  paying dues 35, 119, 127
  recording leadership history 84
  registering 23, 24, 172

- P -

Payments 23, 24, 35, 89, 119, 126, 127
Photos 30
Points 36, 53, 201, 202, 208

- R -

Reports 144
  Achievement Report 146
  Attendance and Dues Worksheet 148
  Attendance Report 149
  Awards List 150
  Birthday List 151
  Check-in and Progress Report Worksheet 152
  Clubber List - Contact Information 153
  Completed Handbooks 154
  Current Handbook Status 155
  Household Account Statements 157
  Household and Member ID List 158
  Household List - Contact Information 159
  Leader List - Contact Information 160
  Leader Service History 161
  Leader Training History 163
  Mailing Labels 164
  Medical List 165
  Member List with Photos 166
  Member Profile 167
  Name Tags 168
  Point List and Worksheet 169
  Receipts Report 170
  Registration Form 172
  Visitor List 174
Roles 104

- S -

Sections 77, 120, 201, 202
Service History 84, 104, 109
System Requirements 10

- T -

Teams 29, 208
Tools Menu 51
Training History 84, 104, 110

- U -

User Interface
  customizations 17
Users 51, 206
  changing password 51

- V -

Visitors 33

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