



Approved Workman Database
a recordkeeping system for Awana clubs

Version 5.9

User Guide

Approved Workman Database 5.9 - User Guide

written by

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Chapter



1

1 Welcome to the Approved Workman Database



The Approved Workman Database (AWdb) 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 Legacy version of AWdb stores data on a personal computer or device. There is also a Web version of the AWdb that stores the data "in the cloud". This guide is for the Legacy version and is designed as both a course in using the database and as ongoing reference while working with the application. It assumes familiarity with how to run an Awana club and focuses on how to integrate AWdb into it.

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 database.
- Visit the [Approved Workman Forum](#) to find helpful training videos.

Chapter



2

2 Getting Started

- [Install a Free Trial Version of AWdb](#) from our website (www.approvedworkman.com). The trial version is a fully functional installation of the program except access is limited to 30-days.
- Use the trial version to [learn the basics](#) of navigating the database and explore all of the features using sample data. The sample data will eventually be erased, so don't worry about altering or deleting records.
- After becoming comfortable with AWdb, [purge the sample data](#) and then begin entering real club data.
- Purchase a license to [activate the database](#) for continued use without reinstalling and without losing any data.

2.1 Minimum System Requirements

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: AWdb can be run without any Internet connection. However, periodically [checking for updates](#) does require an Internet connection

2.2 Possible configurations

Depending on club size and organization, there are a variety of ways to configure a system to run AWdb. Below are some suggestions; however, adjustments can be made as needed.



In addition to the options listed below, there is also a Web version of AWdb available which allows access for multiple users. See our website (www.approvedworkman.com) for additional information.

Single License

This simple setup works for small clubs where a single Awana secretary handles all of the recordkeeping. With a single license, AWdb can be installed on a PC or laptop computer for one user at a time to access the data. (The Database Check-out/Check-in feature is not available with a single license. See below.)

In cases where the single user needs to work on the database from more than one computer (for example, a home PC and one at church), AWdb can be run directly from a USB flash drive for portability. Simply eject the flash drive with AWdb and take it to another computer.



When using a USB flash drive, it is critical to exit the database and then use the proper technique to shut down the USB storage device before removing it from the computer. Not waiting for the confirmation from Windows that it is safe to remove the device might cause file corruption. Also, since all of the data will be on the flash drive, be sure to make backups!

If one person does the data entry and is essentially in charge of the database, then a single user license is all that is needed. However, if another person, such as the Commander or Pastor, also wants a copy of the database, then it is appropriate to have an additional license. (See www.approvedworkman.com for pricing of additional licenses).

Multiple Licenses, using Database Check-out / Check-in

Larger clubs that have a secretary for each club might want multiple licenses. One solution for using multiple licenses is the Database [Check-out / Check-in feature](#). This provides non-networked, multi-user functionality through the use of USB flash drives. Here's how it works:

1. In the Primary database, under **Admin > Database Utilities > Check-out/Check-in**, Check OUT one or more clubs onto a USB flash drive. During this process the Primary database creates a special copy of itself, called a Secondary database, on the USB flash drive. The checked out records will only be editable from the Secondary database. They will be locked in the Primary database until they are checked back in.
2. Eject and safely remove the USB flash drive with the Secondary database. It can then be given to another person to use on a different computer. The Secondary database is launched and run directly from the flash drive. The records for the checked out club(s) can be updated. Meanwhile, the records that were not checked out can be updated in the Primary database.
3. At some point in time, such as the end of club night or the following week, when the USB flash drive with the Secondary database is returned, plug it into the computer with the Primary database and perform the database Check-IN. During this process the Primary database imports all of the new and modified records from the Secondary database and merges them back into the Primary database.

Multiple Licenses, using a Server

Another solution for multiple users is to install AWdb on a server. Each user then logs in to the single instance of AWdb located on the server. (No AWdb software is installed on the workstation.) The number of users that can be logged in simultaneously is determined by the number of licenses. Running AWdb over a local area network is slower than running it on a local hard drive or from a USB flash drive, but it eliminates the Check-out / Check-in steps. A reliable network connection is a must, and a wired connection is faster than a wireless connection.

Record entry, regardless of configuration

With any of these configurations, there are various approaches to entering the attendance and handbook data, such as:

1. Print worksheets from the Reports tab for leaders to use and return to the secretary to be entered into AWdb after club time.
2. Enter data directly into the computer as clubbers arrive and complete handbook sections.
3. Use a combination of worksheets and live data entry.

Discussions on the [AWdb Forum](#) offer additional ideas on ways to use the database. The forum is a great place to ask questions and get feedback. A member of the [support](#) team can also answer questions.

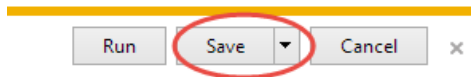
2.3 Installing AWdb

Use the download link provided by customer support to install the Trial version of the database. After [learning about the database](#), [purge](#) the sample data to begin entering live data. [Purchase a license](#) to convert it to a fully-registered version.

Follow the steps below to download and install the Trial version of AWdb:

Downloading the Setup Executable

1. Click the link provided by customer support to download a copy of the Trial database.
2. In the File Download dialog, click **Save**. If a Save As dialog appears, select 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 a folder like 'My Downloads'.

Installing the Database

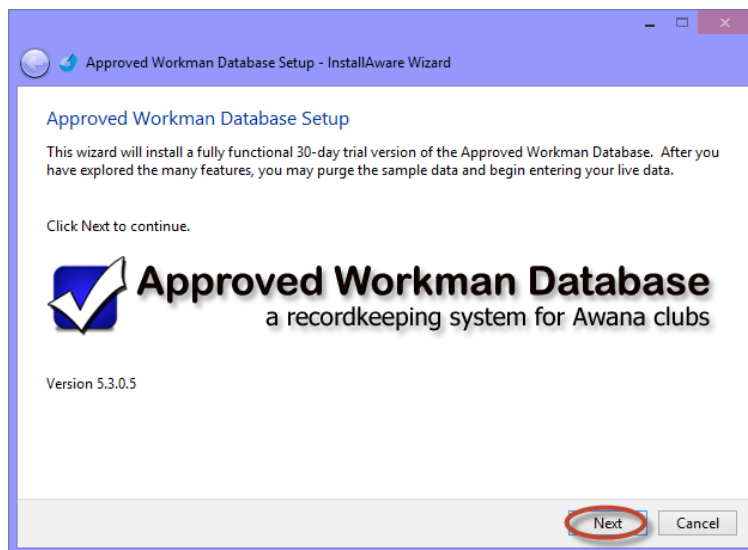
Once the setupAWdb____.exe file has been successfully downloaded:

1. Double click the **setupAWdb____.exe** icon (either on the Desktop or in the Downloads folder) to launch the installation wizard.



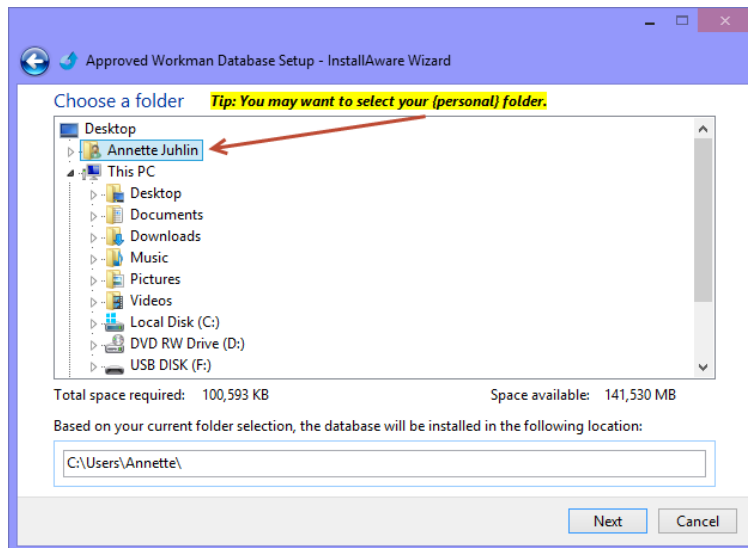
If a "File Security Warning" dialog appears, click **Run**.

2. When the Installation Setup dialog opens, click **Next** to continue.

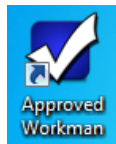


3. Read the License Agreement. Agree to it by scrolling to the bottom. Click **Next**.
4. Read the Late Breaking Information for helpful information and resources. Click **Next**.

5. Choose a folder for installation. We recommend a **Personal** folder or the **root of the C drive (C:)**, *not* on the Desktop. Click **Next**.



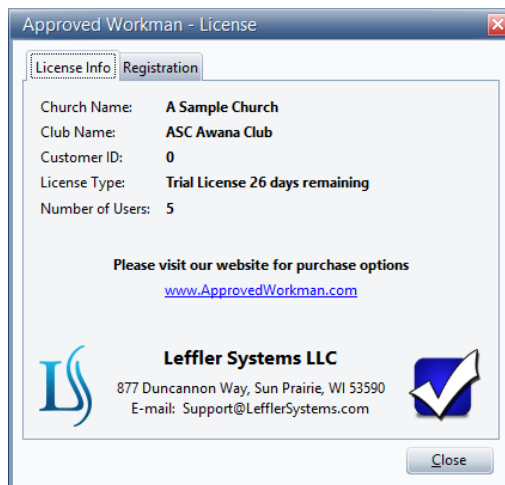
6. The installation wizard will create a desktop shortcut for all users or just for you. Click **Next**.
7. When the installation completes, click **Finish**. There will be a new icon for the Approved Workman Database on your desktop.



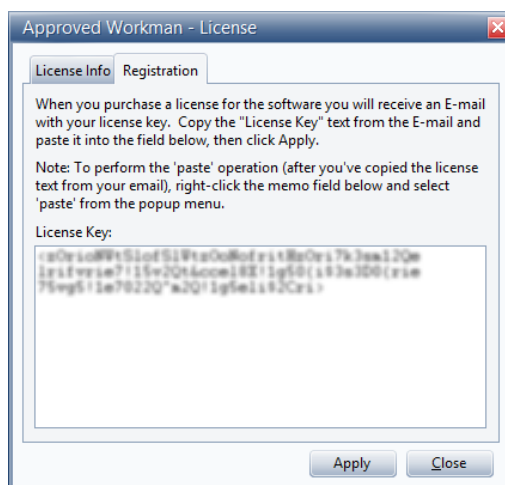
2.4 Activating the Database

When a license for the software is purchased, an e-mail that includes a license key will be sent. To install the permanent license key, follow these instructions (also included in the e-mail attachment):

1. [Log in](#) to AWdb.
2. Select **Help > License Info** from the [Main Window's](#) menu bar to open the License dialog.



3. Select the **Registration** tab.



4. Select and **Copy** the license key text from the e-mail attachment.




Don't try to type it in manually! Typing it will not work because there are hidden characters.

5. Right click in the **License Key** field and select **Paste** from the pop-up menu.
6. Click **Apply**. A confirmation message should display saying: "The License Key has been successfully applied." The database is then a fully registered version. The title bar will no longer show "Trial License - Days Remaining". If there is a message saying: "The License Key is invalid" ensure the key was copied correctly. If there is still a problem, [contact Customer Support](#).


2.5 Updating the Database

After [activating the database](#), check for updates occasionally to get the latest bug fixes and enhancements.


 Set a prompt to check for updates when starting the application under [Admin > Options > System Reminders](#).

Follow the steps below to download the Update Executable:


1. From the [Main Window's](#) menu bar, select [Help > Check for updates...](#) (Admin users only).

 Non-Admin users will not get the pop-up reminder or see the "Check for updates..." menu item.

2. In the confirmation dialog, click **Check for updates now** to communicate with Leffler Systems to see if updates are available. (An Internet connection is required.)

 If a warning appears from a firewall software, such as Norton, McAfee, or Microsoft, choose **Always Allow** from the options to allow AWdb to access the Internet now and on future occasions.

3. The Account and Update Information dialog opens. The Account Information shows the Account Status and the Contact Information on file. To change the contact information, use the **Comments** field to indicate changes. For older versions of the database, instructions are provided for downloading and applying the update. For newer versions, simply click **Apply the Update**.

 Detailed instructions, including a [video](#), are available on the forum.

Account and Update Information

Account Information

A Sample Church

Customer ID: 100
Licenses: 1
Status: Active
Renewal Date: 7/1/2019
Balance Due: \$0.00

| Contact Name | Position | Type | Display As | Primary | Billing |
|---------------|----------------|-------|-------------------|--------------------------|--------------------------|
| Church Office | Church Office | Phone | 608-555-1212 | <input type="checkbox"/> | <input type="checkbox"/> |
| Jane Doe | Club Secretary | Email | JaneDoe@gmail.com | <input type="checkbox"/> | <input type="checkbox"/> |
| John Doe | Commander | Email | JohnDoe@gmail.com | <input type="checkbox"/> | <input type="checkbox"/> |

Here is a sample message from Tech Support for the ASC Awana Club.

The latest version is 5.7.0.6. If your version is less, apply the update shown, and then check again for the next update.

Update Information

Updates are available! The next update will install version 5.7.0.6

This is the 4th update for 2018-2019 and includes a bug fix for the Attendance and Dues Worksheet and makes corrections to Inventory items for Sparks Entrance booklets.

Comments

Use the field below to inform us of changes we should make to your contact information shown above.

Send notes about contact information changes here

News from Leffler Systems

Build 5706 fixes a bug in the Attendance and Dues Worksheet and updates Inventory records related to Sparks Entrance Booklets and Multipack item numbers.

Apply the Update

Close

2.6 Contacting Customer Support

Supporting You is Important to Us!

We are committed to providing great support to Approved Workman Database 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 [AWdb 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 tips. 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 AWdb users.

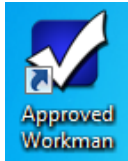
Chapter

3


3 Logging into AWdb

Follow the steps below to log in to AWdb:


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



2. Type the **User Name** and **Password** for a [user account](#). For a Trial database, use "demo" for both the User Name and Password.


 The [purge sample data](#) process provides a prompt to set up a new Admin user account.

The image shows the 'Approved Workman Database' login dialog box. It has a blue header with the text 'Welcome. Please log in.' and the 'Approved Workman Database' logo. Below the logo is the text 'a recordkeeping system for Awana* clubs'. There is a photo of four people on the left with a small text box that says 'right click here to add your own photo'. On the right, there is a 'Trial license for:' section with 'A Sample Church' and 'ASC Awana Club'. Below that are 'User Name:' and 'Password:' fields, both containing 'demo'. There are 'Log In', 'Utilities', and 'Exit' buttons. Below the buttons is a 'Primary Database' section with a dropdown menu. At the bottom, there is a 'Local Data Path:' field with the value 'C:\Approved Workman\Data' and a dropdown arrow.

 The advanced actions of the **Utilities** button are discussed in the [Utilities](#) section.

 For fun, [update the photo](#) on the Log-in dialog.

3. The **Local Data Path** field is filled in automatically. Under normal circumstances, it does not need to be changed.

 The default path would need to be changed after [restoring a backup](#) into a different folder to access it instead of the live data.

4. Click **Log In**. In a few seconds, the [Main Window](#) opens. The database's functionality is organized into distinct modules which are accessible by clicking the tabs. This makes it very easy to move from one area of functionality to another.



Several self-explanatory reminder messages could appear before the Main Window. Read them and understand the purpose of each before proceeding.

Approved Workman Database - A Sample Church - Trial License - 10 days remaining

File View Tools Window Help User: Jane Smith Today is: 11/20/2014 Primary Database

Search Members: No windows are open Current Club Year: 2013-2014 Club Date: 9/25/2013 Week 4

Home

Calendar

| September 2013 | | | | | | | October 2013 | | | | | | |
|----------------|----|----|----|----|----|----|--------------|----|----|----|----|----|----|
| S | M | T | W | T | F | S | S | M | T | W | T | F | S |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 | 1 | 2 | 3 | 4 | 5 | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 | 6 | 7 | 8 | 9 | 10 | 11 | 12 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 | 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 | 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 | 27 | 28 | 29 | 30 | 31 | 1 | 2 |
| 29 | 30 | | | | | | 3 | 4 | 5 | 6 | 7 | 8 | 9 |

2 Birthdays from 9/25/2013 to 10/1/2013

| Member | Type | Club Name |
|---------------|---------|---------------|
| Carson, Ben | Clubber | T&T Challenge |
| Sabello, Nora | Clubber | Sparks girls |

3 Visitors on 9/25/2013

| Visitor's Name | Brought By | Club Visited |
|----------------|---------------|---------------|
| Dixon, Myra | Easton, Lucy | T&T Adventure |
| Jenning, Sarah | Carson, Ben | T&T Challenge |
| Jones, Jeremy | Easton, Lucas | T&T Adventure |

Attendance

Club Attendance

Clubber Handbook Alerts 2013-2014 Club Calendar Notes Photo

Show: Club Dates

Session_Date: 0

| Club_Name | Meeting_Day | Week_Number | Quarter | Clubbers | Leaders | Visitors | Sections |
|---|-------------|-------------|---------|----------|---------|----------|----------|
| * Session_Date : 9/4/2013 (22 Clubbers, 9 Leaders, 1 Visitors, 36 Sections) | | | | | | | |
| + Session_Date : 9/11/2013 (21 Clubbers, 10 Leaders, Visitors, 32 Sections) | | | | | | | |
| + Session_Date : 9/18/2013 (23 Clubbers, 9 Leaders, Visitors, 25 Sections) | | | | | | | |
| - Session_Date : 9/25/2013 (34 Clubbers, 11 Leaders, 3 Visitors, 52 Sections) | | | | | | | |
| Awana | Wednesday | 4 1st | | 0 | 3 | 0 | 0 |
| Cubbies | Wednesday | 4 1st | | 4 | 0 | 0 | 0 |
| Journey | Wednesday | 4 1st | | 4 | 1 | 0 | 0 |
| Puggles | Wednesday | 4 1st | | 1 | 0 | 0 | 0 |
| Sparks boys | Wednesday | 4 1st | | 3 | 1 | 0 | 0 |
| Sparks girls | Wednesday | 4 1st | | 3 | 0 | 0 | 0 |
| T&T Adventure | Wednesday | 4 1st | | 10 | 3 | 2 | |
| T&T Challenge | Wednesday | 4 1st | | 8 | 1 | 1 | |
| Trek | Wednesday | 4 1st | | 1 | 2 | 0 | |
| | | | | 34 | 11 | 3 | |

Clubbers: Low 21 High 34 Avg 25 Leaders: Low 9 High 11 Avg 9 Clubbers/Leader: 2.8/1

Version 5.3.0.5 Data: C:\Approved Workman\Data

Chapter



4

4 Learning the Basics

AWdb consists of different modules that work together to maintain records for an Awana program. Each tab on the Main AWdb 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 AWdb. 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. After becoming familiar with AWdb, [purge the sample data](#); then run the [New Year Setup](#).
4. Review the [Club Setup](#) to adjust point values for the weekly attendance categories and personalize items like Custom Field headings and Team Names.
5. [Enter your church and club information](#) so it prints on reports and can be used on order forms.
6. Review customizations under the [Options](#) tab.
7. For fun, personalize the database's [look and feel](#) with photos on the [Home Page](#) or [Log-in dialog](#).
8. Begin [entering member records](#).
9. [Assign members to teams](#) and [assign handbooks](#) and [uniforms](#).
10. To convert the Trial Version to a fully registered version, [purchase a license](#).
11. Preview reports that might be useful getting started:
 - [Registration Forms](#) - for clubbers or leaders; blank or pre-filled
 - [Name Tags](#) - 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](#), [Visitor list](#), and [Award list](#) - use during the closing ceremony
 - [Clubber Contact Information](#) - facilitate sending encouragement and birthday wishes
12. Use the [Check-in Module](#) to keep track of attendance, [points](#), and [dues](#).
13. Mark [handbook sections as completed](#) and [pull awards](#).
14. Learn how to [work with the grids](#) to generate ad-hoc reports.
15. Run the [backup](#) utility (under **Admin > Database Utilities**) each week to protect your data!

After learning the basics, [continue to learn more!](#)

4.1 Customizing the Database

AWdb can be customized both in the way it looks and in how it functions, such as:

- [Changing the "skin"](#) and the [tab positions](#)
- Replacing the sample photos on the [Log-in dialog](#) and [Home Page](#)
- Adjusting options and setting defaults in [The Admin Module](#)

4.1.1 Choosing a Database Skin

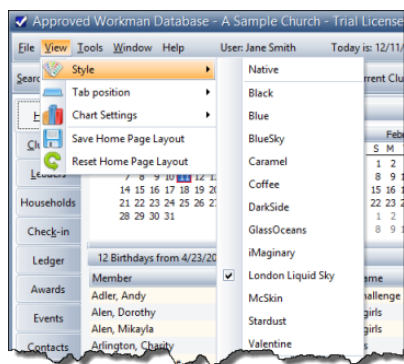


A "skin" is a collection of style settings that affect the look and feel of the AWdb windows. Each skin has a different color scheme and might slightly alter the proportions of tabs, buttons, and text.



Most of the screen-captures in this manual use the "London Liquid Sky" 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 AWdb will be immediately updated.



4.1.2 Choosing the Main Window's Tab Position

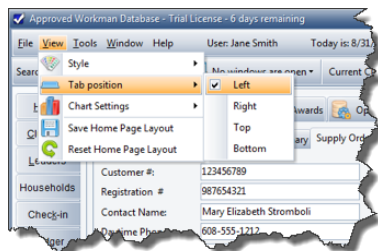


The [Main Window's](#) tabs can be displayed along the top or bottom, or along the left or right side.



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 the left side.

To change the tab position, select **View > Tab position** from the [Main Window's](#) menu bar. Select a tab position from the submenu. AWdb will be immediately updated.



4.1.3 Screenshot Examples

"McSkin" with Tabs on Left

Approved Workman Database - Trial License - 9 days remaining

User: Jane Smith Today is: 8/28/2012 Primary Database

Search Members:

Club Year: 2010-2011 Club Date: 5/11/2011 Week 35 (last Week of the 4th Qtr)

Attendance

Club Attendance

2010-2011 Club Calendar

Clubber Handbook Alerts Notes Photo

Show: Club Dates

| Date | Club Name | Wk | Qtr | Clubbers | Leaders | Visitors | Sections | Theme |
|------------|-----------|----|-----|----------|---------|----------|----------|----------|
| 11/17/2010 | | 48 | | 30 | 30 | 79 | 79 | Sections |
| 11/24/2010 | | 53 | | 29 | 29 | 91 | 91 | Sections |
| 12/1/2010 | | 48 | | 32 | 32 | 75 | 75 | Sections |
| 12/8/2010 | | 52 | | 30 | 30 | 71 | 71 | Sections |
| 12/15/2010 | | 52 | | 29 | 29 | 71 | 71 | Sections |
| 1/5/2011 | | 37 | | 27 | 27 | 83 | 83 | Sections |

Clubbers: Low 30 High 61 Avg 44 Leaders: Low 15 High 32 Avg 24 Clubbers/Leader: 1.8/1

Version 5.1.0.0 Data: C:\Approved Workman\Data

"Spring" with Tabs on Top

Approved Workman Database - Trial License - 9 days remaining

User: Jane Smith Today is: 8/28/2012 Primary Database

Search Members:

Club Year: 2010-2011 Club Date: 5/11/2011 Week 35 (last Week of the 4th Qtr)

Home Clubbers Leaders

Calendar

Club Attendance

2010-2011 Club Calendar

Clubber Handbook Alerts Notes Photo

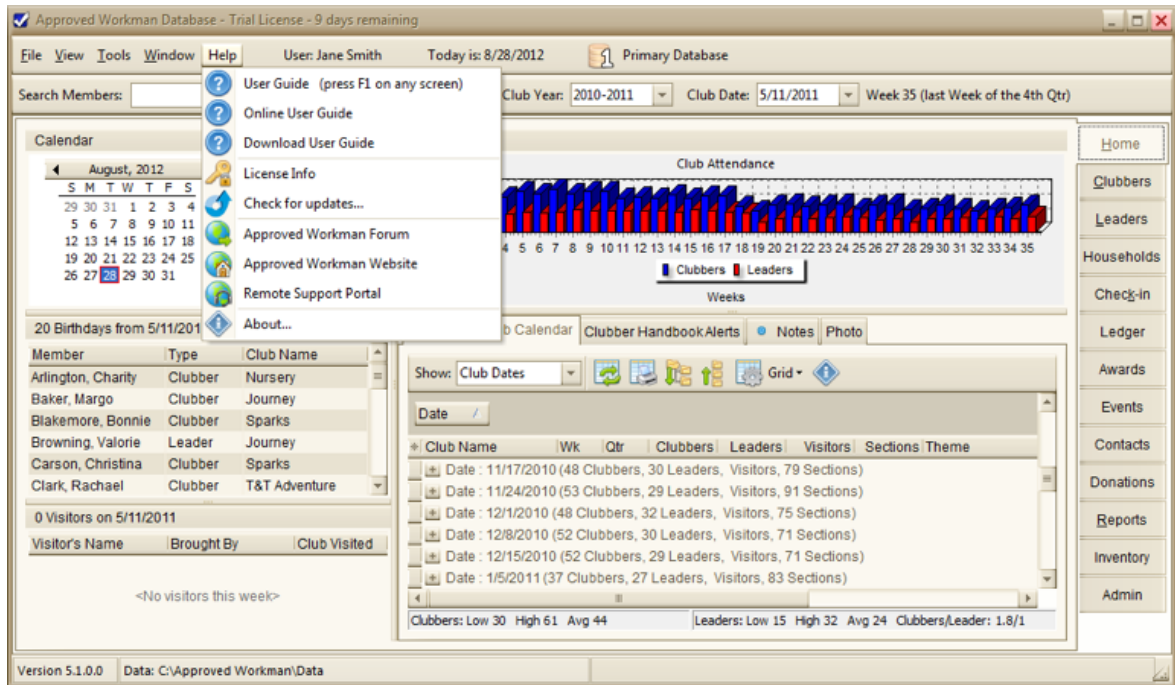
Show: Club Dates

| Date | Club Name | Wk | Qtr | Clubbers | Leaders | Visitors | Sections | Theme | Offering Fu |
|------------|-----------|----|-----|----------|---------|----------|----------|----------|-------------|
| 11/17/2010 | | 48 | | 30 | 30 | 79 | 79 | Sections | |
| 11/24/2010 | | 53 | | 29 | 29 | 91 | 91 | Sections | |
| 12/1/2010 | | 48 | | 32 | 32 | 75 | 75 | Sections | |
| 12/8/2010 | | 52 | | 30 | 30 | 71 | 71 | Sections | |

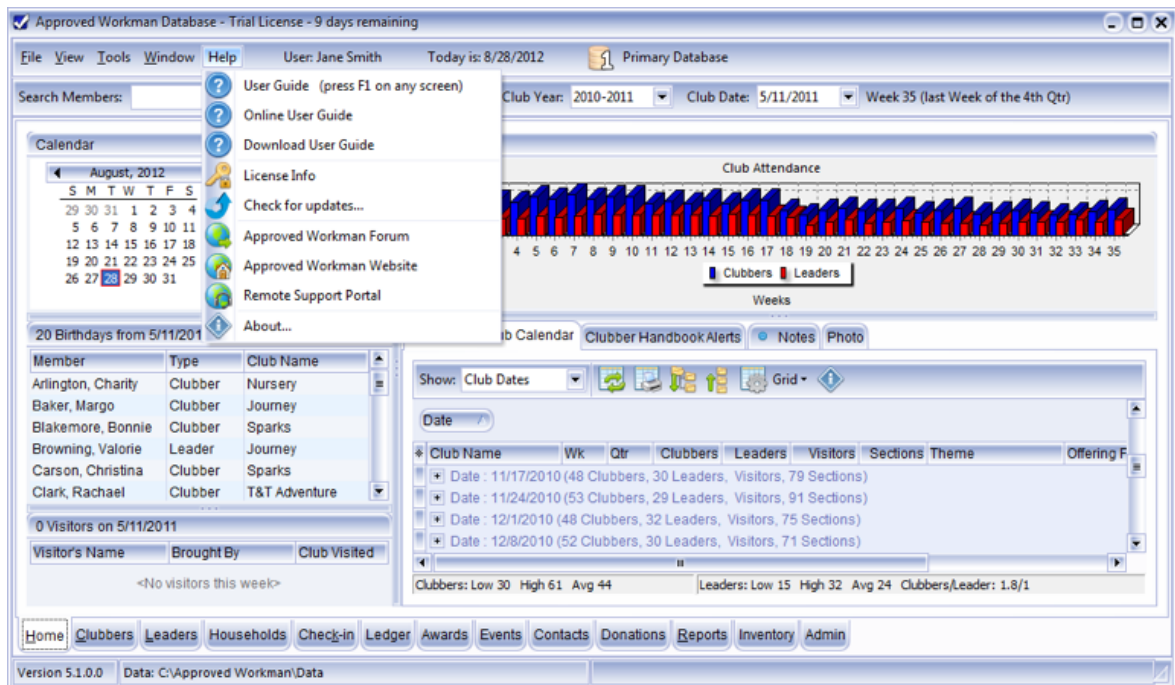
Clubbers: Low 30 High 61 Avg 44 Leaders: Low 15 High 32 Avg 24 Clubbers/Leader: 1.8/1

Version 5.1.0.0 Data: C:\Approved Workman\Data

"Coffee" with Tabs on Right



"Stardust" with Tabs on Bottom



4.2 Entering Clubbers and Leaders

[Purge the sample data](#) before beginning to enter live member data. To create a new member (Clubber or Leader), use one of the following to open the [Member Window](#):

- [Main Window](#)'s File menu: **New > Member** menu item
- [Clubbers Module](#) toolbar: **New Clubber** button
- [Leaders Module](#) toolbar: **New Leader** button
- [Member Window](#) toolbar: **New Member** or **New in Household** button
- [Check-in Module](#) toolbar: **New Member** button

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

Member

Member Type: Clubber
 Status: Active
 Title: Miss
 First Name: Rachael
 Last Name: Clark
 Suffix:
 Nickname:
 Preferred: Rachael
 Pronunciation:
 Mailing Name: Miss Rachael Clark
 Birth Date: 7/6/2001
 Gender: Female
 Club Name: Trek
 Team Name:
 Team Color: Orange
 Leader Name:
 LIT for Club:

Age 13 Gr: 7
 Code:
 Club Loc: Annex
 Team Loc:
 Net Points: 30
 Club Loc:

Household

Filing Name: Clark Family - Ethan/Rachael
 Mailing Name: Clark Family
 Parent Name(s): Mr and Mrs Clark
 Address Line 1: 15 Zagnut Lane
 City / State / Zip: Madison WI 53714
 Family Church: Prairie Revival

Contact Info

| | |
|---------------------------|-----------------|
| 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 |

Household Members

| | | | | |
|--------------------|--------|--------|---------|---------|
| Mr Ethan Clark | Age 15 | Active | Clubber | Journey |
| Miss Rachael Clark | Age 13 | Active | Clubber | Trek |

Browse Household Status: Active Created 12/9/2010 8:07:47 AM Modified 10/7/2014 2:02:31 PM by Jane



It is generally easier to [Assign a team](#) from the main [Clubbers list](#) for [multiple members](#) at once.


4.2.1 Entering Contact Info






Capturing contact information such as phone numbers and e-mail addresses for members facilitates communication. This information is entered for the entire household. To create a new contact record, from the [Main](#) page of a member's record, use one of the following to open the E-Contacts dialog:


- Toolbar: **Phone/E-mail** button
- Contact Info grid: double click in the grid or right click and select **Open Phone/E-mail**.

| Type | Phone Number or E-mail Address | Member Link | Contact Person | Contact Relationship | Cell Carrier | Ok to Text | Primary | Private |
|------------|--------------------------------|-------------|-----------------|----------------------|--------------|-------------------------------------|-------------------------------------|--------------------------|
| Cell Phone | (715) 584-4320 | Ethan | Ethan | | Sprint | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Cell Phone | (741) 852-8522 | Rachael | Rachael | | Sprint | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E-mail | ethanc@mymail.com | Ethan | Ethan | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| E-mail | rachaelc@yahoo.com | Rachael | Rachael | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Home Phone | (715) 582-0001 | | Brian or Sharon | Mom and Dad | | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

 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](#).
 -  AWdb can automatically add rows for specific types of communication records. Under Admin > Generic Lookups > Comm Type, choose to "automatically add this row when creating new members". This is useful if certain contact information is required for all members, like an Emergency Phone number.
 - **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.

4.2.2 Setting Registration to Current

 The **Registration current** check box on the Member Window's [Misc](#) tab 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](#). Select it directly on the Misc Tab or use the [Register and Post a Payment dialog](#) or [The Registration Window dialog](#) which will mark it automatically. Use one of the following:

- [Clubbers Module](#) toolbar: **Action > Register and Post Payment** or **Action > Open Registration Window** menu items; or **Begin the Registration Process** button
- [Leaders Module](#) toolbar: **Action > Register and Post Payment** menu item
- [Households Module](#) toolbar: **Open Registration Window** button
- [Check-in Module](#) toolbar: **Action > Register and Post Payment** menu item; or **Begin the Registration Process** button




Each of the above modules also has a right click pop-up menu with registration options.

[Register and Post a Payment](#) provides a date selection to use when marking the selected member's registration as current and allows an [unapplied payment](#) to be posted. It sets the member's **status** to "Active" and creates the fee record for annual [dues](#) (if applicable).

The [Registration Window](#) provides a single place to review member information, select members to register, assign books and uniforms, review fees, post payments, and print registration reports.


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 than one member.


- **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 Window's **Misc** tab. 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.

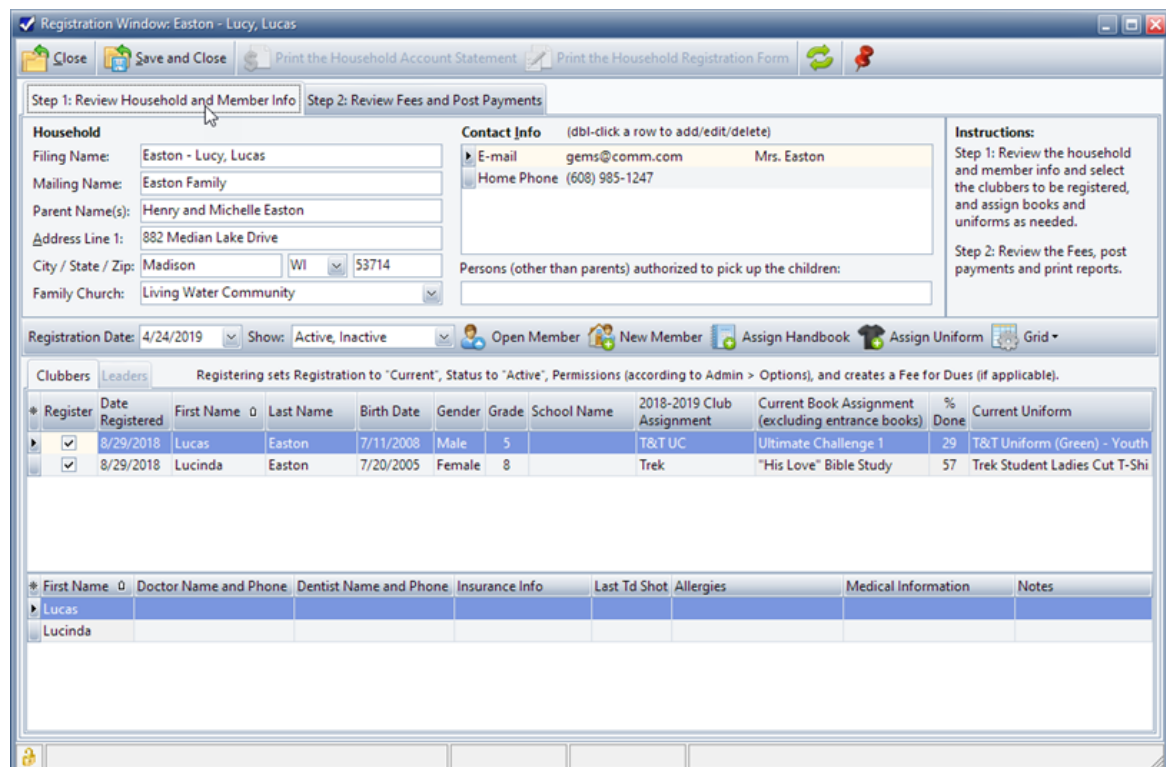
 Use the [Registration Window dialog](#) to perform additional tasks such as editing member data, assigning books and uniforms, or posting payments directly to fees.

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.



Registration Window: Easton - Lucy, Lucas

Close Save and Close Print the Household Account Statement Print the Household Registration Form

Step 1: Review Household and Member Info Step 2: Review Fees and Post Payments

Household

Filing Name: Easton - Lucy, Lucas
Mailing Name: Easton Family
Parent Name(s): Henry and Michelle Easton
Address Line 1: 882 Median Lake Drive
City / State / Zip: Madison WI 53714
Family Church: Living Water Community

Contact Info (dbl-click a row to add/edit/delete)

E-mail: gems@comm.com Mrs. Easton
Home Phone: (608) 985-1247

Persons (other than parents) authorized to pick up the children:

Instructions:
Step 1: Review the household and member info and select the clubbers to be registered, and assign books and uniforms as needed.
Step 2: Review the Fees, post payments and print reports.

Registration Date: 4/24/2019 Show: Active, Inactive Open Member New Member Assign Handbook Assign Uniform Grid





Clubbers Leaders Registering sets Registration to "Current", Status to "Active", Permissions (according to Admin > Options), and creates a Fee for Dues (if applicable).

| Register | Date Registered | First Name | Last Name | Birth Date | Gender | Grade | School Name | 2018-2019 Club Assignment | Current Book Assignment (excluding entrance books) | % Done | Current Uniform |
|-------------------------------------|-----------------|------------|-----------|------------|--------|-------|-------------|---------------------------|--|--------|-------------------------------|
| <input checked="" type="checkbox"/> | 8/29/2018 | Lucas | Easton | 7/11/2008 | Male | 5 | | T&T UC | Ultimate Challenge 1 | 29 | T&T Uniform (Green) - Youth |
| <input checked="" type="checkbox"/> | 8/29/2018 | Lucinda | Easton | 7/20/2005 | Female | 8 | | Trek | "His Love" Bible Study | 57 | Trek Student Ladies Cut T-Shi |

| First Name | Doctor Name and Phone | Dentist Name and Phone | Insurance Info | Last Td Shot | Allergies | Medical Information | Notes |
|------------|-----------------------|------------------------|----------------|--------------|-----------|---------------------|-------|
| Lucas | | | | | | | |
| Lucinda | | | | | | | |

- **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 Member** - 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.

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|--|--|---|
| | Registration Date | The date defaults to the current club date but can be changed. |
| | 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. |
|  | 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. |


- **Register** - sets **Registration Current** and **registered** date in the Member Window's [Misc](#) tab 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.


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 window. |
|  | Stay on Top | Toggles whether or not the window stays on top of the main window. |

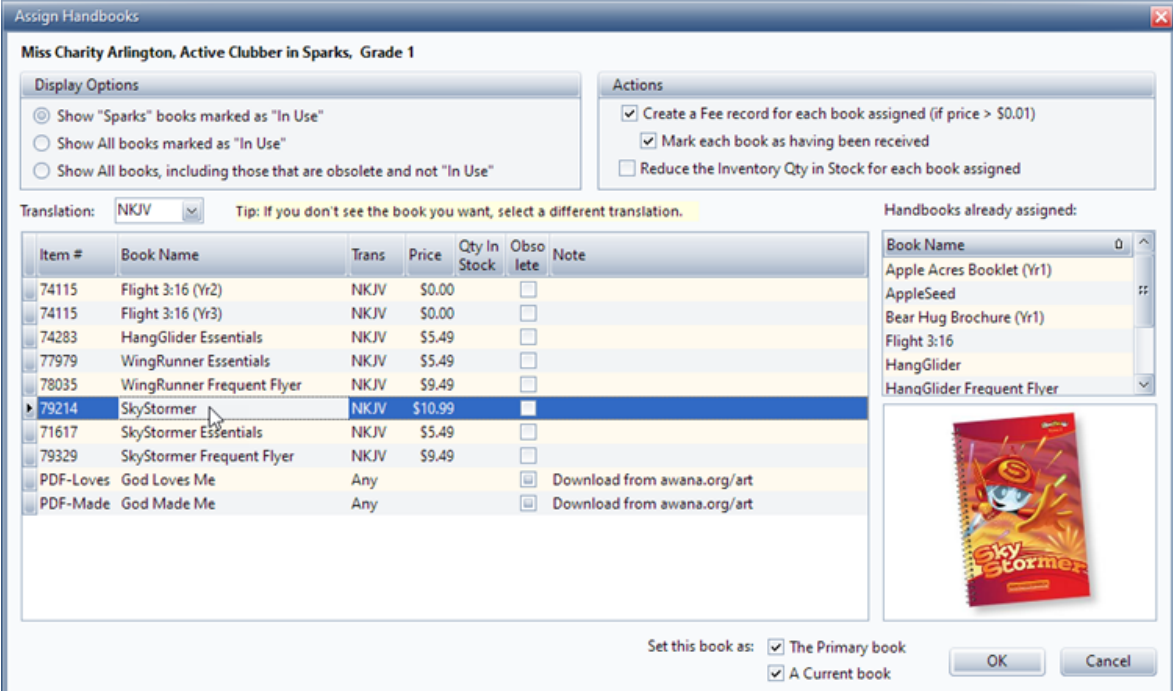
4.2.3 Assigning Handbooks

 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.

 When [adding a visitor](#) during a club night, the easiest way to assign an entrance booklet is to check **Prompt to Assign an Entrance Booklet** at the bottom of the Add a Visitor dialog which opens the Assign Handbooks dialog when the Add a Visitor dialog is saved and closed.

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](#) 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 of the above modules also has a right click pop-up menu option to Assign Handbook.



Assign Handbooks

Miss Charity Arlington, Active Clubber in Sparks, Grade 1

Display Options

Show "Sparks" books marked as "In Use"

Show All books marked as "In Use"

Show All books, including those that are obsolete and not "In Use"

Translation: Tip: If you don't see the book you want, select a different translation.

Actions

Create a Fee record for each book assigned (if price > \$0.01)

Mark each book as having been received

Reduce the Inventory Qty in Stock for each book assigned

| Item # | Book Name | Trans | Price | Qty In Stock | Obsolete | Note |
|-----------|---------------------------|-------|---------|--------------|--------------------------|-----------------------------|
| 74115 | Flight 3:16 (Yr2) | NKJV | \$0.00 | | <input type="checkbox"/> | |
| 74115 | Flight 3:16 (Yr3) | NKJV | \$0.00 | | <input type="checkbox"/> | |
| 74283 | HangGlider Essentials | NKJV | \$5.49 | | <input type="checkbox"/> | |
| 77979 | WingRunner Essentials | NKJV | \$5.49 | | <input type="checkbox"/> | |
| 78035 | WingRunner Frequent Flyer | NKJV | \$9.49 | | <input type="checkbox"/> | |
| 79214 | SkyStormer | NKJV | \$10.99 | | <input type="checkbox"/> | |
| 71617 | SkyStormer Essentials | NKJV | \$5.49 | | <input type="checkbox"/> | |
| 79329 | SkyStormer Frequent Flyer | NKJV | \$9.49 | | <input type="checkbox"/> | |
| PDF-Loves | God Loves Me | Any | | | <input type="checkbox"/> | Download from awana.org/art |
| PDF-Made | God Made Me | Any | | | <input type="checkbox"/> | Download from awana.org/art |

Handbooks already assigned:

Book Name

Apple Acres Booklet (Yr1)


AppleSeed

Bear Hug Brochure (Yr1)

Flight 3:16

HangGlider

HangGlider Frequent Flyer





Set this book as: The Primary book

A Current book


OK Cancel

- **Display Options** - filter selections for the list of handbooks 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](#).

- **Select** - the handbook to assign by clicking on the record.
- **Set this book as:**
 - **The Primary book** - indicates this is the clubber's main book. (A Primary book will also be marked as a Current book.) If the clubber will work in the book, but it is NOT the main book, clear this box.
 - **A Current book** - indicates the clubber is working in the book. A book may be current without it being primary. (For example, a separate Bible reading plan begin completed in addition to the main handbook for Trek or Journey.)

 These check boxes are helpful at the start of the club year when assigning both entrance books and main handbooks.

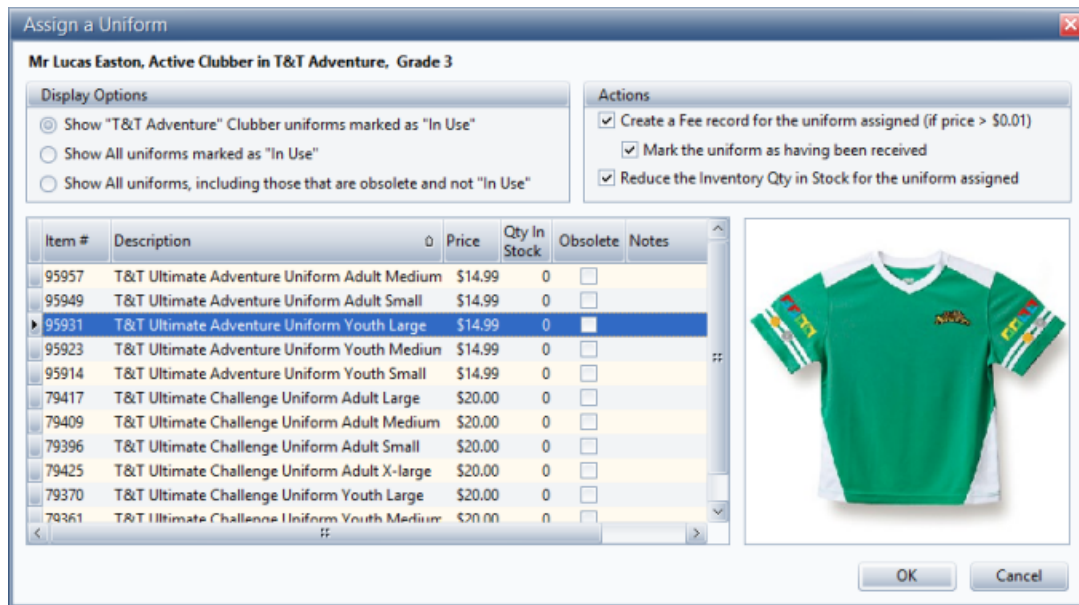
- **Handbooks already assigned** - for reference only; the list of handbooks to select for assignment will not include books already assigned.
- **OK** - adds the book to the member's [Handbook](#) list and completes any selected actions.
- **Cancel** - exits the handbook assignment dialog without saving.


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.

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

- Member Window > [Misc](#) tab: **Assign Uniform** button (under Permissions and Registration)
- [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
- Choosing **Yes** when prompted to assign a uniform after a clubber completes an entrance book.



- **Display Options** - filter selections for the list of uniforms 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 selected, the list is further filtered based on whether the member is a leader, a clubber, or a Student Leader (LIT).
- **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 check when entering historical data)
-  Change the default settings for the actions under [Admin > Options > Misc.](#)
- **OK** - checks the **Has Uniform** box on the Member Window's [Misc](#) tab 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. Additionally, AWdb provides: Purple, Silver, Aqua, Orange, Pink, Gold, Gray and Brown
- **Name** - additional groupings with unique team names can be used in addition to the club name and team color. Enter team names under [Admin > Club Setup > Team Names](#). Once the team names are created, members can be assigned to a team.



A team's meeting location can be set when defining the Team Names. It will be displayed on the [Main](#) tab of the [Member Window](#) as well as in the the Clubber, Leader or Check-in grids.

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

- Member Window > [Main tab](#): **Team Name** or **Team Color** field
- [Clubbers Module](#) toolbar: **Action** > **Set Team Color** or **Set Team Name** menu item
- [Leaders Module](#) toolbar: **Action** > **Set Team Color** or **Set Team Name** menu item
- [Check-in Module](#) toolbar: **Action** > **Set Team Name** menu item



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.



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).

4.2.6 Managing Member Photos

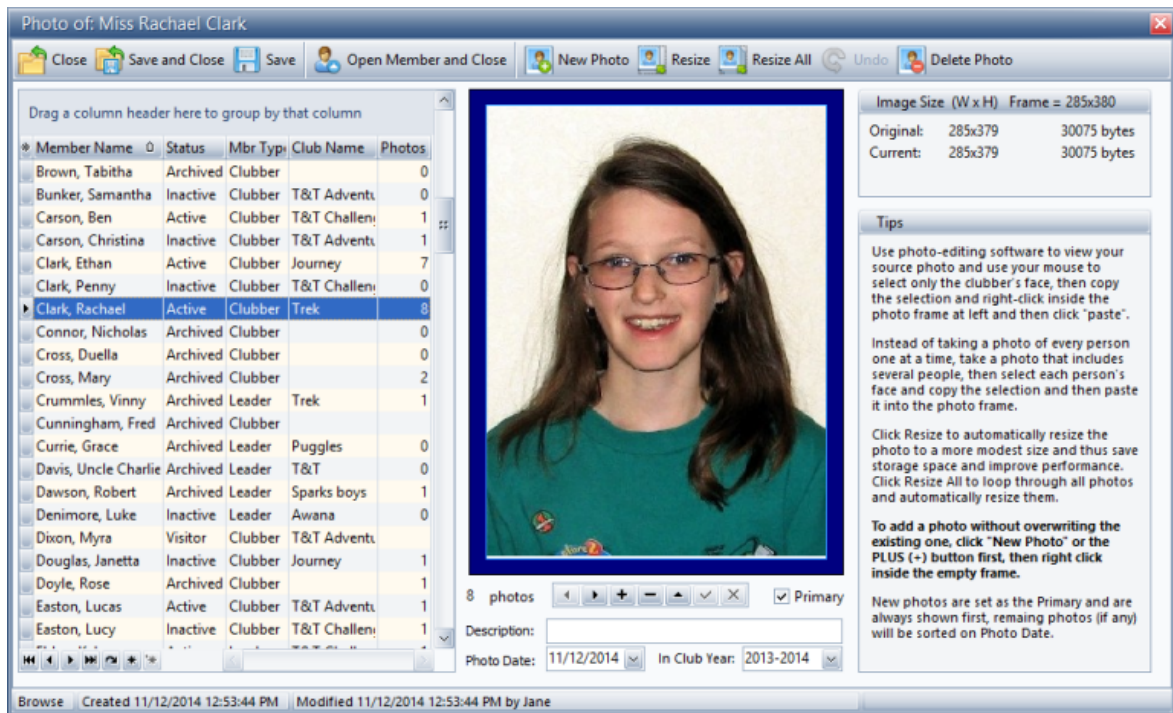


Member photos are especially helpful in large clubs where it might be hard to remember names. There are several reports that can use the photos, plus photos are displayed whenever the [Member Window](#) is opened. The Photo Manager provides an easy way to review and load photos for any member in the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


- [Main Window](#) Tools menu: **Tools** > **Manage Photos** menu item
- [Member Window](#): on the toolbar, **View/Edit the Photo(s)** button; or Double click on the photo
- [Clubbers Module](#) toolbar: **View/Edit the Photo(s)** button; **Action** > **View/Edit the Photo(s)** menu item
- [Leaders Module](#) toolbar: **View/Edit the Photo(s)** button
- [Check-in Module toolbar](#): **View/Edit the Photo(s)** button; **Action** > **View/Edit the Photos(s)** menu item



Each of the above modules also has a right click pop-up menu that includes **View/Edit the Photos(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 having 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 stored for the selected member, 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. |
|  | Undo | Cancels the last change. |
|  | Delete Photo | Removes the current photo. [Functions the same as the Minus (-) button beneath the photo.] |

4.3 Basic Check-In

The Check-in Module includes the functionality most used on a club night. 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 on a club night. 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. The "**Other**" cell allows typing in a positive or negative number to add or subtract points (for example, rewarding good behavior or disciplining bad behavior, respectively).



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](#).

The screenshot shows the 'Approved Workman Database - A Sample Church - Trial License - 10 days remaining' window. The main area displays a list of members with columns for Name, Team, Attend (Club, Church), Dues (Paid, Amt Pd, Balance), Offering, and Total (Sections, Points). The member Lucas Easton is highlighted. To the right, a detailed view for Lucas Easton shows his participation in 'Ultimate Adventure 1 (2010)' with a list of discovery sections, their status (Required, Review/Extra Credit, Notes), and completion dates.

| Name | Team | Attend Club | Attend Church | Dues Paid | Dues Amt Pd | Dues Balance | Offering Amount | Total Sections | Total Points |
|-------------------|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------|--------------|-----------------|----------------|--------------|
| Alen Mikayla | Sparks girl | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 2 | 190 |
| Alen Dorothy | Sparks girl | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$16.50 | \$0.00 | 2 | 195 |
| Allan Trevor | Sparks boy | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 5 | 195 |
| Allan Jaqueline | Sparks girl | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 3 | 155 |
| Brackenheim Kevin | Sparks boy | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 3 | 165 |
| Carson Ben | T&T Chall | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | 0 | 165 |
| Clark Ethan | Journey | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 0 | 85 |
| Clark Rachael | Trek | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 0 | 0 |
| Dixon Myra | T&T Adve | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | 0 | 115 |
| Easton Lucas | T&T Adve | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 9 | 150 |
| Jenning Sarah | T&T Chall | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | 0 | 110 |
| Jones Jeremy | T&T Adve | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | 0 | 80 |
| Kaedle Stephanie | Journey | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | 0 | 30 |
| Loomis Dennis | Sparks boy | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 2 | 135 |
| Maretti Michael | Trek | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 1 | 10 |
| Maretti Anna | Trek | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | 1 | 30 |
| Sabelle Nora | Sparks girl | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 2 | 85 |
| Thrace Miranda | Trek | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$16.50 | \$0.00 | 1 | 10 |
| Uppenheim James | Sparks boy | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | 2 | 110 |

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



The display name for the Church/SS attendance column can be customized under **Admin > Club Setup > Custom Fields**.

- **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. A [Donation](#) record is automatically created for money entered here as an offering.
- **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 - Yes** is automatically marked and 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.
- **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**, **attendance ratio**, and the **Household Balance**. Click on the Household Balance information to open the [Household Ledger](#) for more details. There is also a check box to indicate AWdb should "**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 from one of the following:

- [Check-in Module](#) toolbar: **Add a Visitor** button
- [Member Window](#) toolbar: **Add a Visitor** button
- Member Window's [Misc](#) tab, lower **Visitor Information** grid (labeled "The following Visitors were Guests of..."): **Add a Visitor** right click pop-up menu item

Using any of these actions opens the Add a Visitor dialog:

- **Identify the visitor as being a guest of...** - indicates the visitor was brought by a member and provides a drop-down list of names. It defaults to checked and uses the member that was selected when the dialog was opened as the member who brought the visitor. A different member can be selected. For a visitor who comes without being brought by a member, clear the box.
- **The visitor is not currently / is already in the database** - provides the option to add a member record for a first time visitor (not in the database) or give a member credit for bringing a guest a second time (already in the database). When the visitor is in the database, the adjacent drop-down list of members is enabled. The Visitor Info fields are then filled in automatically.
- **Date Visited** - defaults to the current club date, but can be changed.
- **The Visitor Info** - same as information entered for a new member. See the Member Window's [Main](#) tab for more details.



Entering a **Title** will select the **Gender** automatically. Entering a **Birth Date** calculates the **Age** and derives the **Grade**. With the **Grade** and **Gender**, AWdb will automatically set the **Club Assigned** field.



In the lower left of the dialog, choose **Prompt to Assign an Entrance Booklet** when the dialog closes.

4.5 Working with Dues

Details and settings for working with dues are found throughout AWdb. This section provides an overview of how to assign 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, Sparks \$12/year, and T&T \$15/year. Also, clubbers might pay dues once for the entire year or pay a little each week. AWdb 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.

| | Awana | | | | | T&T | T&T |
|--------------------|---------|---------|---------|---------|---------|---------|------|
| Weekly Dues Amount | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0 |
| Annual Dues Amount | \$18.00 | \$18.00 | \$18.00 | \$18.00 | \$18.00 | \$18.00 | \$18 |
| Room Location | | | | | | | |

* Denotes a column whose Display Name is customizable under the Custom Fields tab

2. Enter the **Weekly Dues Amount** for each club and the **Annual Dues Amount**.

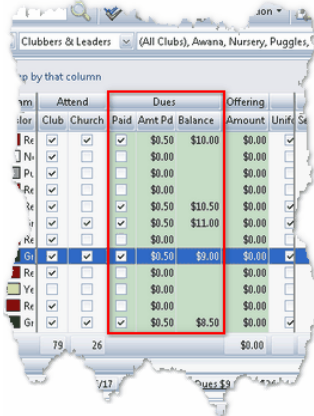
- The weekly dues amount is used when the **Dues Pd** check box is marked on the [Check-in grid](#).
- The annual dues amount determines the amount of the dues fee created when a clubber is [registered](#) (or a weekly dues payment is made).



Try to use values that make mathematical sense. For example, if weekly dues are \$0.50 and there are 32 weeks, then the annual dues should be \$16.00.


Marking the Weekly Dues as Paid

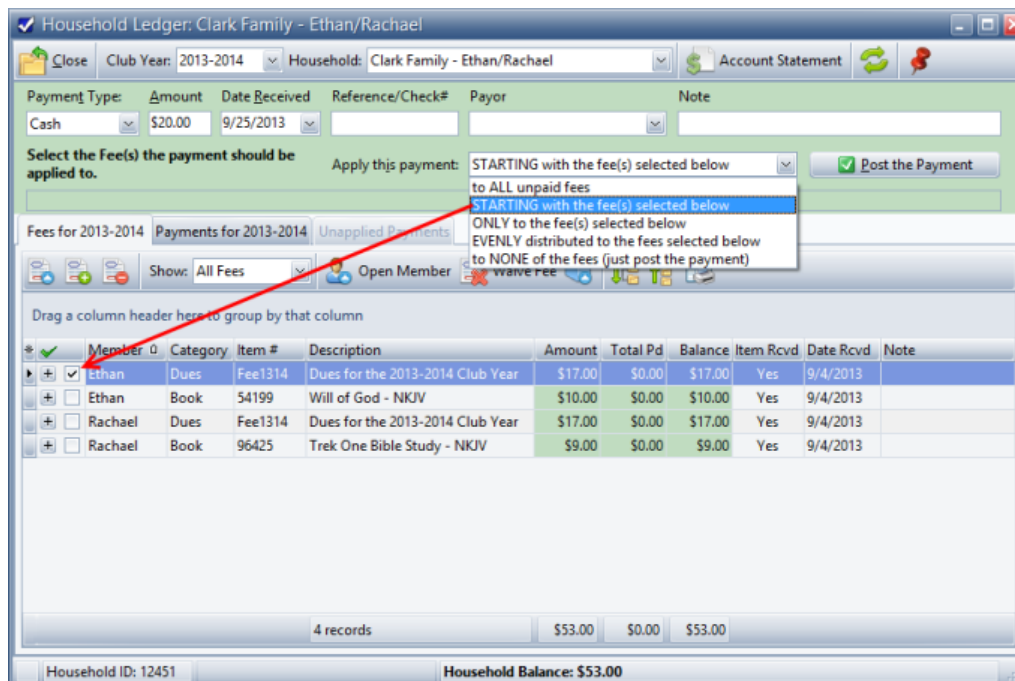
The easiest way to mark weekly dues as paid is to use the [Check-in Module](#) as follows:



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](#). The amount remaining is shown in the **Balance** column.
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.

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.



Post-paid and pre-paid dues are handled automatically when a payment for Dues is posted in the Household Ledger by updating the **Dues Pd** field on the Check-in screen for the appropriate number of weeks.

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

AWdb helps alleviate the hassle normally associated with keeping track of points for an Awana Store or to determine team winners. Set points to be awarded for: attending club, wearing the uniform, bringing a Bible, handbook, or a visitor, etc. AWdb does all the calculating as items and sections are marked.

Initial Setup

- Setup/review point values for attendance related items under [Admin > Club Setup](#).
- Review/modify the point values of handbook sections under [Admin > Curriculum](#).

Total Points

During Check-in, attendance and other items are marked. During or after handbook time, the completed handbooks sections are marked. At the end of the night, the total points each clubber earned 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 be used to analyze point data. [Sorting](#), [filtering](#) and [grouping](#) the data in the grid can identify the clubber with the highest total points within each Club, within each Team within each Club, 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.

| Name | Club | Attend | Dues | Offering | Misc | Visitors | Points | Req Sections | Total | | | | | | | |
|---|-------------|-------------------------------------|-------------------------------------|----------|---------|----------|-------------------------------------|-------------------------------------|--------------------------|---|---|-----|----|-----|----|------|
| Team Color: Blue (2 present, Total Points: 345, Avg: 172.5, Total Req Sections: 5, Avg: 2.5) | | | | | | | | | | | | | | | | |
| Alen, Mikayla | Sparks girl | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 140 | 2 | 20 | 2 | 190 |
| Allan, Jaquelin | Sparks girl | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 85 | 3 | 30 | 3 | 155 |
| | | 2 | 1 | \$0.00 | \$0.00 | \$0.00 | 2 | 2 | | 0 | 0 | 225 | 5 | 50 | 5 | 345 |
| Team Color: Green (3 present, Total Points: 410, Avg: 136.7, Total Req Sections: 7, Avg: 2.3) | | | | | | | | | | | | | | | | |
| Brackenheimer | Sparks boy | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 95 | 3 | 30 | 3 | 165 |
| Loomis, Denni | Sparks boy | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 85 | 2 | 20 | 2 | 135 |
| Uppenheim, Ji | Sparks boy | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 60 | 2 | 20 | 2 | 110 |
| | | 3 | | \$0.00 | \$0.00 | \$0.00 | 3 | 1 | 3 | 0 | 0 | 240 | 7 | 70 | 7 | 410 |
| Team Color: Red (2 present, Total Points: 495, Avg: 165.0, Total Req Sections: 9, Avg: 3.0) | | | | | | | | | | | | | | | | |
| Alen, Dorothy | Sparks girl | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$16.50 | \$0.00 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 125 | 2 | 20 | 2 | 195 |
| Allan, Trevor | Sparks boy | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 145 | 5 | 50 | 5 | 195 |
| Sabello, Nora | Sparks girl | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 0 | 0 | 65 | 2 | 20 | 2 | 105 |
| | | 2 | 1 | \$0.00 | \$0.00 | \$0.00 | 2 | 1 | 1 | 0 | 0 | 335 | 9 | 90 | 9 | 495 |
| | | 7 | 2 | 0 | \$0.00 | \$0.00 | 7 | 2 | 6 | 0 | 0 | 800 | 21 | 210 | 21 | 1250 |

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 the records on the **Section Groups and Awards** tab of each [Generic Handbook](#) record (under **Admin > Curriculum**). The award that is triggered when a book is completed is determined by the records under **Admin > Awards > Book Awards**.

Award record 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. AWdb is initially configured to use the section and book awards suggested by Awana Clubs International. However, for clubs that choose to use different awards, AWdb allows adding items to the Inventory records so those items are available to use 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.

- **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.
- **List awards from both Ultimate Challenge books** - allows selection of awards from either of the two groups of awards associated with the UA books. To assign a different award, click the **Award Name** cell and select from the drop-down list.
- **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**".
 - ℹ️ 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 AWdb. 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 AWdb.

The following grid related buttons and menu items appear on many toolbars throughout AWdb:

| Icon | Action | Description |
|---|---------------------------|---|
|  | Refresh Grid | Refreshes the data in the grid. This is especially important when AWdb is run over a network where other users might have updated records. 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 . |

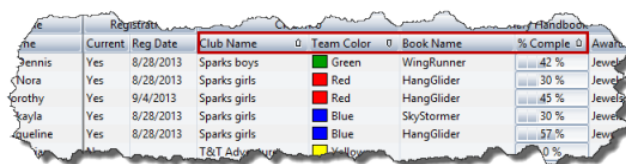
Selecting multiple records

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).




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.

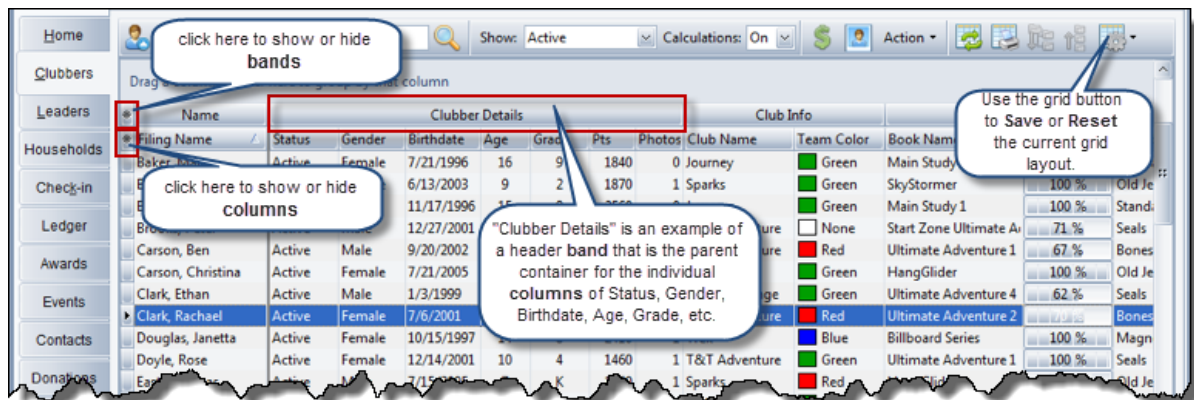
4.8.2 Customizing Visible Columns

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 AWdb uses that selection as the default. Temporarily hide columns to create an ad-hoc report; then when finished, quickly restore the last saved layout.

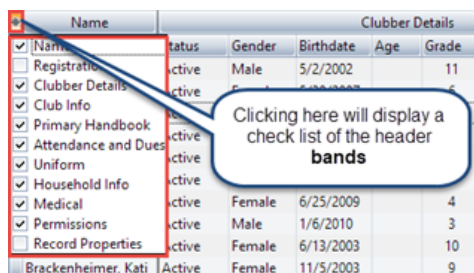
Setting a Column's Visibility


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.

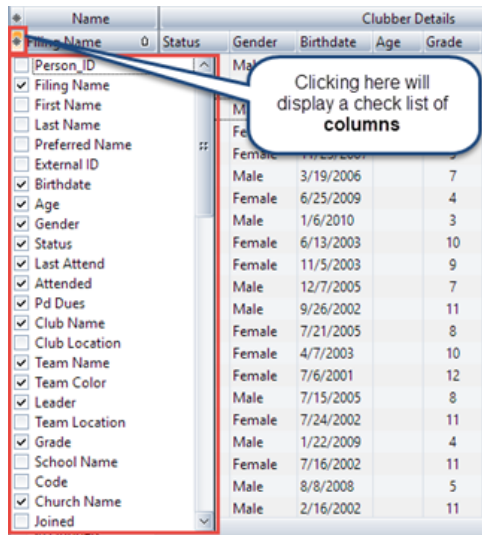


There are two ways to update the visibility of a column:

1. Set the visibility of the **Column Header Band** for the associated 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 **Person ID**, **Filing Name**, **First Name**, **Last Name**, and **Preferred Name** columns are associated with the **Name** header band. If the **Name** header band is hidden, the listed columns will also be hidden.



- 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.



Moving Visible Bands and Columns

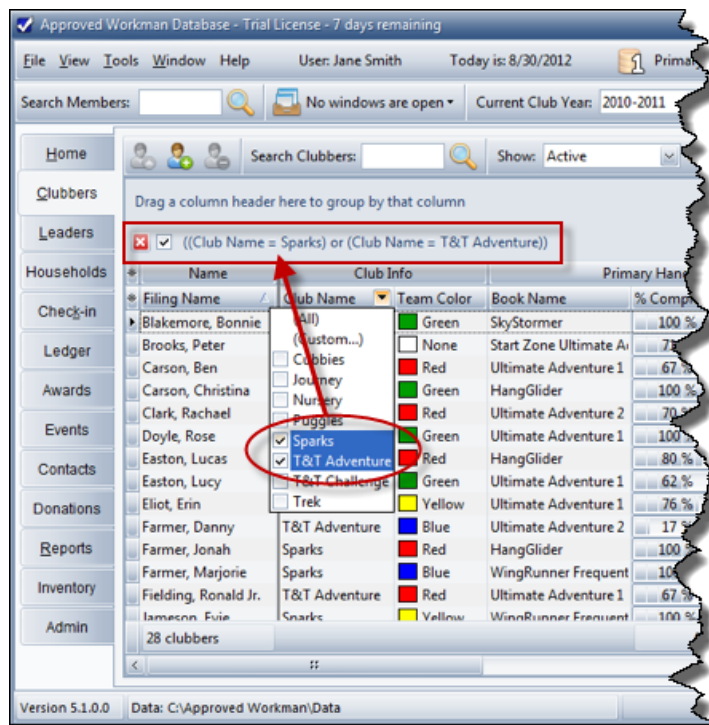
Besides controlling which columns are visible, columns can be rearranged. An entire band can be moved, or a column can be moved within the band. Drag a column or header band to the desired location and drop it when the green arrows appear showing it is a valid drop location.


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:

- 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.
- Select one or more check boxes to indicate which records to display. For example, clicking "Sparks" will show only clubbers who are in Sparks. Clicking both "Sparks" and "T&T Adventure" will show clubbers who are in either club.
- 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.
- 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 Adventure, 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 what is available in the header drop-down menus, click the **Customize...** button found on the right side of the area above the grid (when a filter is 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 which contains "**(Custom...)**" in a drop-down menu can be customized beyond the options available in its drop-down 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 without recreating them. To open the advanced Filter Builder tool, click the **Grid** button in the toolbar (the one with a gear) and select **Custom Filter Dialog** from the drop-down menu. (Refer to **Changing a Customized Filter** below.)

Creating a Customized Filter

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

3. Select the operator for the condition from the top left drop-down list.

4. In the field to the right of the operator, if applicable, type the value for the condition.
5. Once this top condition is completed, either click **OK** to run the filter, or add another condition.
6. 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.

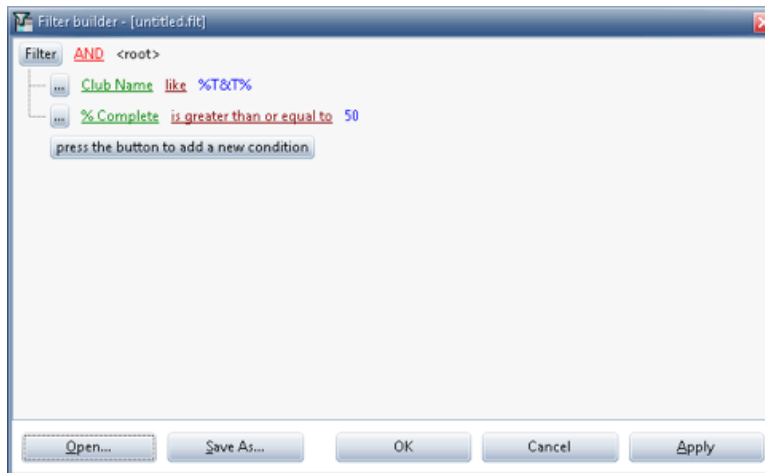
7. Fill in the operator and value for the second condition.
8. Click **OK**. The filter conditions are shown above the grid and the data shown in the grid is adjusted.

| Drag a column header here to group by that column | | | | | | | | | |
|---|-----------------|-----|---------------|------------|-----------------------------|------------------|-----------|-------------|--|
| ☒ (Club Name LIKE %T&T%) and (Book % Complete > 50 %) Customize... | | | | | | | | | |
| Name | Clubber Details | | | Club Info | | Primary Handbook | | | |
| Filing Name | Grade | Pts | Club Name | Team Color | Book Name | % Complete | Award Set | Translation | |
| Adler, Andy | 6 | 275 | T&T Challenge | Blue | Ultimate Adventure 2 (2010) | 100 % | Bones | NKJV | |
| Carson, Ben | 6 | 245 | T&T Challenge | Green | Ultimate Adventure 2 (2010) | 100 % | Bones | NKJV | |
| Mundy, Gillian | 5 | 70 | T&T Challenge | Yellow | Ultimate Adventure 1 (2010) | 52 % | Bones | NKJV | |
| Thomas, H Ezekiah | 6 | 55 | T&T Challenge | Red | Ultimate Adventure 2 (2010) | 73 % | Bones | NKJV | |

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.

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](#).

| Name | Attend | Dues | Offering | Misc | Total |
|--|-------------------------------------|-------------------------------------|----------|--------|--------------|
| Color: Blue (5 members, 5 present, Total Points: 320, Avg: 64.0, Total Req Sections: 6, Avg: 1.2) | | | | | |
| Color: Green (5 members, 5 present, Total Points: 240, Avg: 48.0, Total Req Sections: 5, Avg: 1.0) | | | | | |
| Color: None (2 members, 2 present, Total Points: 20, Avg: 10.0, Total Req Sections: 0, Avg: 0.0) | | | | | |
| Color: Red (5 members, 5 present, Total Points: 190, Avg: 38.0, Total Req Sections: 5, Avg: 1.0) | | | | | |
| Color: Yellow (5 members, 5 present, Total Points: 250, Avg: 50.0, Total Req Sections: 4, Avg: 0.8) | | | | | |
| Jameson, Evie Sparks | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | 1 70 |
| Lawrence, Tre Sparks | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | 1 60 |
| Noble, Helen Sparks | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.50 | \$0.00 | 1 50 |
| Svenson, Mari Sparks | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | 0 10 |
| Uppenheim, J Sparks | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | 1 60 |
| 22 | | 7 | \$0.00 | 14 | 9 13 20 1020 |

- 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 **Club Name** column shows how many of each gender are in each club.)
- 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 what is typed in the Search field. In the Clubbers, Leaders and Check-in Modules, the filter works on the **First**, **Last**, or **Preferred** name fields. In the Inventory Module's Item grid, it works on the **Item #** or **Description** fields. 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.

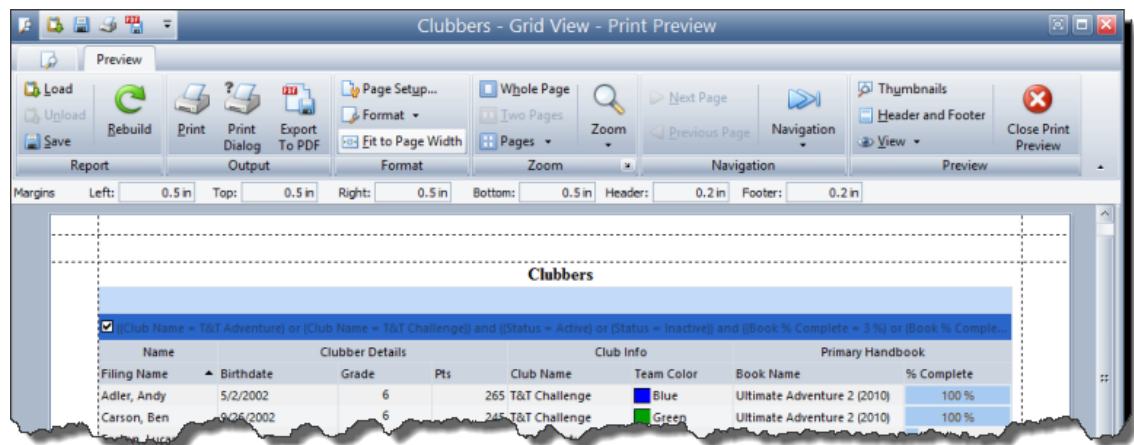
2. Start typing either a name or an item number, depending on the grid. The grid will scroll to the first row that matches and the row will be selected.
3. To start a different incremental search, press Esc before typing again.

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.



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 the document.
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 the grid's data to an external file format by exporting data from a grid. Currently, the following formats are supported: Microsoft Excel, HTML, and Text files with '~', '|', or ',' used as field separators. Exporting grid data could be useful to start with AWdb data and use it for something like a mail-merge data file for MS Word, importing data into another application or generating a very specific looking report.

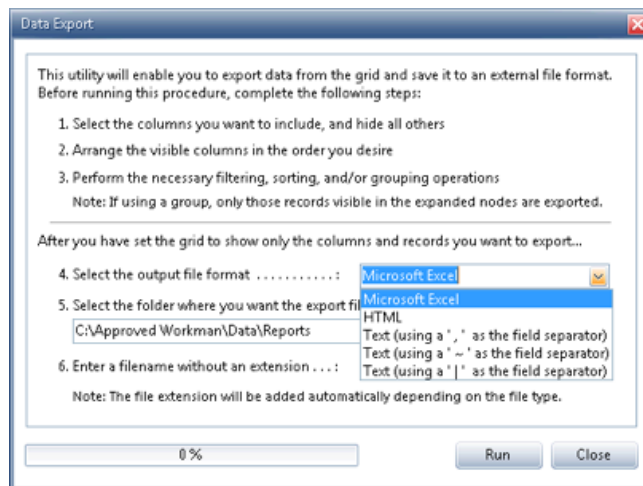
To export a grid:

1. [Sort](#), [customize visible columns](#), and apply [filters](#) or [groupings](#) to the grid.



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

2. Select **Export...** from the [Grid menu](#) to open the Data Export dialog.



3. Select the **output file format** from the drop-down menu.
4. Select the **folder** where the exported file will be saved.
5. Either accept the default **filename** or enter a preferred filename to use when saving the file.



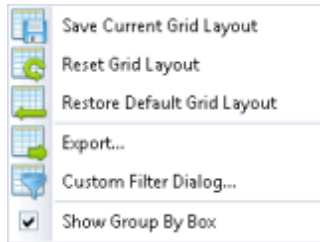
Do not add an extension to the filename since AWdb will do that.

6. 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](#). Make sure each person has a unique AWdb user account so users don't change each other's preferred settings!

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 AWdb 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 layout that AWdb used when first installed.

Other Menu Items

- **Custom Filter Dialog...** opens the Filter Builder dialog to [create, modify, save 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 scheme for alternating rows in the grid



Use **Alternate Grouping Style** and **Use Alternate Color Scheme for Rows** options are only available when viewing AWdb in the "Native" [Style](#).

Chapter

5

5 Beyond the Basics

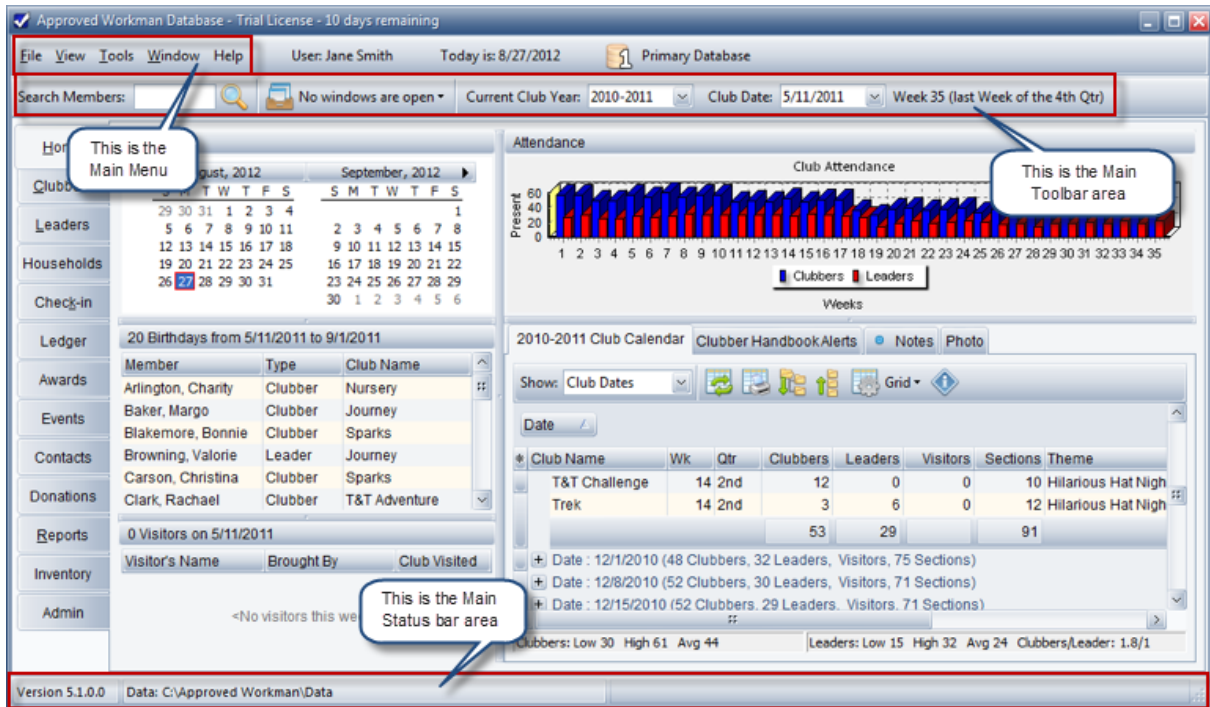
Besides tracking the basics like member contact information, attendance, dues, handbooks, sections and points, AWdb can also track leader service and training, inventory, donations, household account balances, events, contacts, and more. This section assumes understanding of the topics covered under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

1. Record [service history](#) and [training](#) events for leaders to determine if requirements have been met. AWdb can [evaluate attendance requirements](#) to determine if a leader has attended enough weeks to count towards a year of service.
2. Start to track Inventory by [entering your club's current inventory](#) into the database. Once it's initialized, the inventory Quantity in Stock values can be automatically decreased as awards are earned and books are assigned and increased as items on an Order are marked as Received. AWdb can even automatically add items to an order when the quantity in stock gets low. For this all to work, make sure that the [Inventory Tracking options are turned on](#).
3. Maintain details about [orders](#) placed with Awana Clubs International including which items have been received or back-ordered. Although AWdb 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 information 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 or the [Donations Module](#) to keep track of extra money that is given for any reason. The names of the accounts to which donations can be made can be customized. If a donation earned an award, that can be indicated.
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 using the **File > New** menu, 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!

5.1 The Main Window

AWdb'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 User**, the **Current Date** and the type of **Database** (Primary or Secondary). If clubs are checked out, those are listed.

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 **Path** to the current data, and a progress bar when needed.











5.1.1 The File Menu

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


| Icon | Action | Description |
|---|----------------------|---|
|  | New | Opens the relevant dialog with blank/default values to create a new record. |
|  | 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.

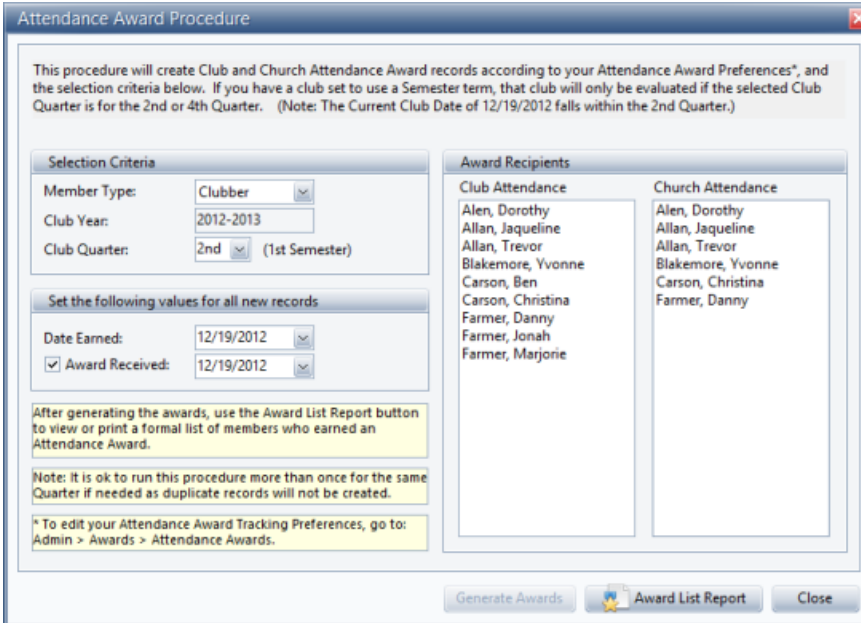
| Icon | Action | Description |
|---|--|---|
|  | <u>Attendance Awards</u> | Generates church and club attendance awards. |
|  | <u>Club Store</u> | Provides a tool to manage Club Store tasks such as looking up accumulated points and entering points spent. |
|  | <u>Gather E-mail Addresses...</u> | Collects e-mail addresses or textible phone numbers based on selection criteria. |
|  | <u>Inventory Quick Reference</u> | Provides a resource to quickly search for an inventory item that is "In Use". |
|  | <u>Manage Photos</u> | Provides a way to work with the photos for all members. |
|  | <u>Recalculate Total Points</u> | Recalculates the total number of points and Required and Extra Credit sections for all members or a specific member. |
|  | Show Users.. | Displays a list of all users that are currently logged in to the database. |
|  | <u>Invoke Maint. Mode</u> | Sends a message to all users and forces them to log off within 5 minutes so maintenance can be performed on 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. |

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.



Attendance Award Procedure

This procedure will create Club and Church Attendance Award records according to your Attendance Award Preferences*, and the selection criteria below. If you have a club set to use a Semester term, that club will only be evaluated if the selected Club Quarter is for the 2nd or 4th Quarter. (Note: The Current Club Date of 12/19/2012 falls within the 2nd Quarter.)

| Selection Criteria | Award Recipients |
|----------------------------------|-------------------|
| Member Type: Clubber | Club Attendance |
| Club Year: 2012-2013 | Church Attendance |
| Club Quarter: 2nd (1st Semester) | Alen, Dorothy |
| | Allan, Jaqueline |
| | Allan, Trevor |
| | Blakemore, Yvonne |
| | Carson, Ben |
| | Carson, Christina |
| | Farmer, Danny |
| | Farmer, Jonah |
| | Farmer, Marjorie |

Set the following values for all new records

Date Earned: 12/19/2012

Award Received: 12/19/2012

After generating the awards, use the Award List Report button to view or print a formal list of members who earned an Attendance Award.

Note: It is ok to run this procedure more than once for the same Quarter if needed as duplicate records will not be created.


* To edit your Attendance Award Tracking Preferences, go to: Admin > Awards > Attendance Awards.

Generate Awards Award List Report Close

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

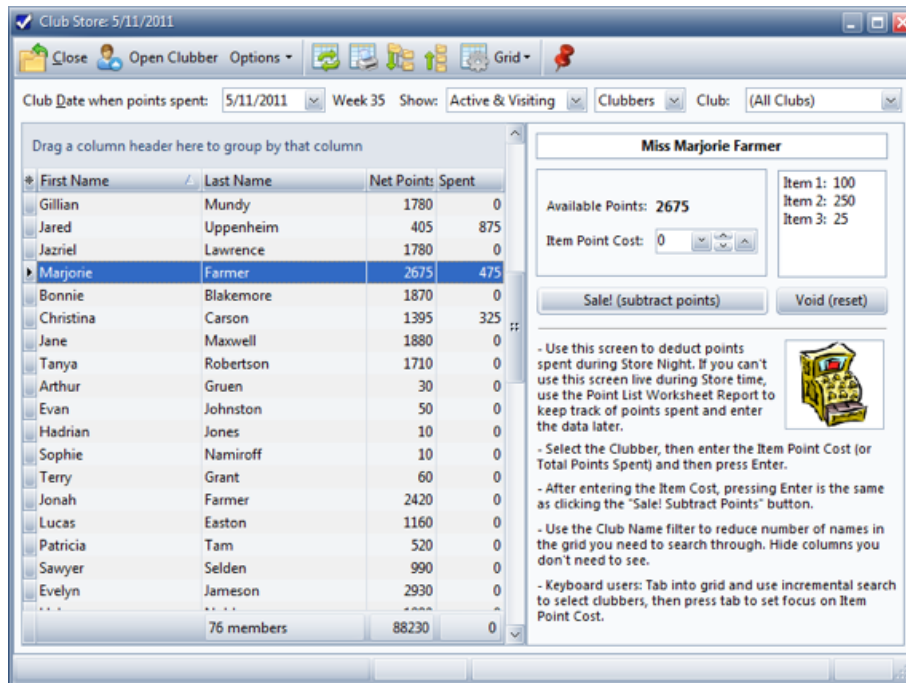


Use this tool to see how many points a clubber has to spend and to deduct points that are spent, as follows:



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:

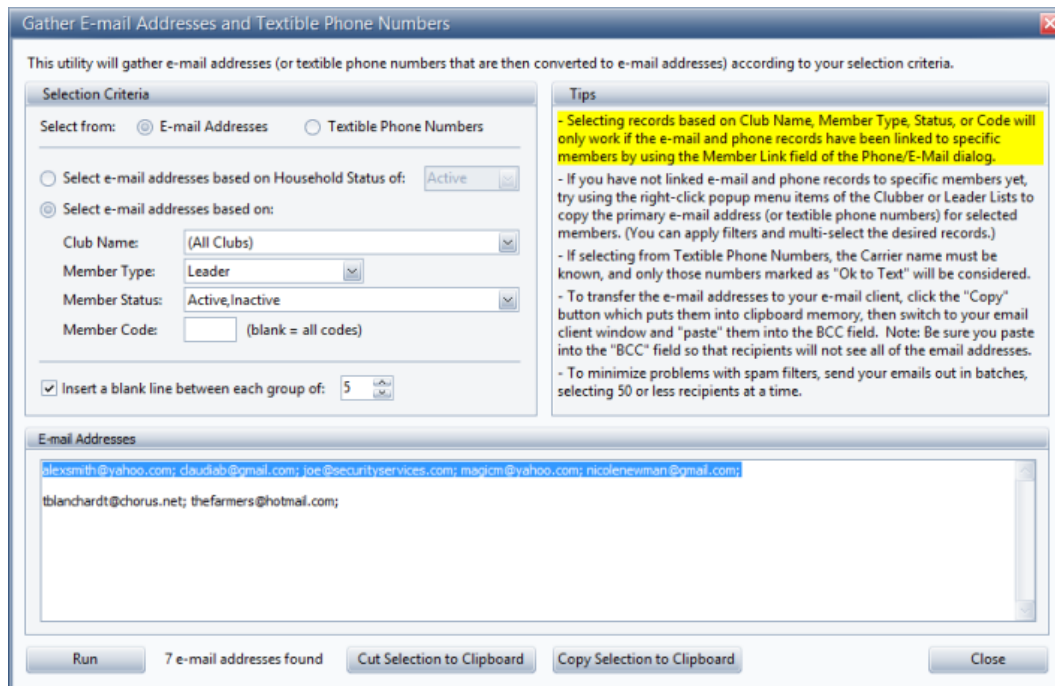
- **Open Clubber** - opens the [Member Window](#) for the selected clubber to get more details
- **Options** - choose to **Set focus to Item Point Cost after selecting clubber**, and/or **Set focus back to the grid after pressing Enter**
- **Stay On Top** - a toggle button that is either selected or 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.

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.

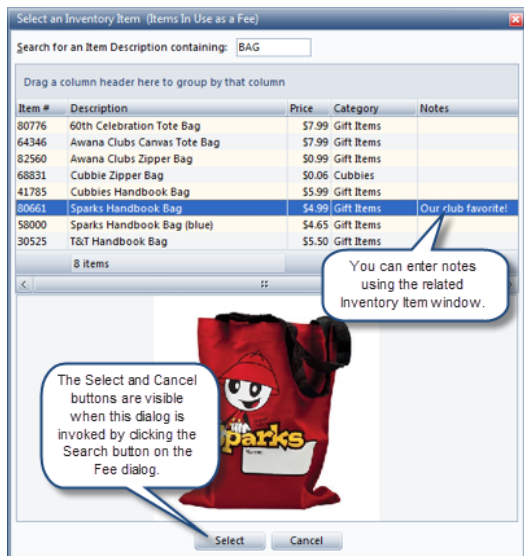
 E-mail addresses or textible phone numbers can also be collected from the [Clubbers](#) or [Leaders](#) grids. Turn on **Calculations** to populate the Primary E-mail column and [filter](#) as desired. [Multi-select rows](#) and use **Action > Copy E-mail Addresses** or **Copy Textible Phone Numbers**.

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.

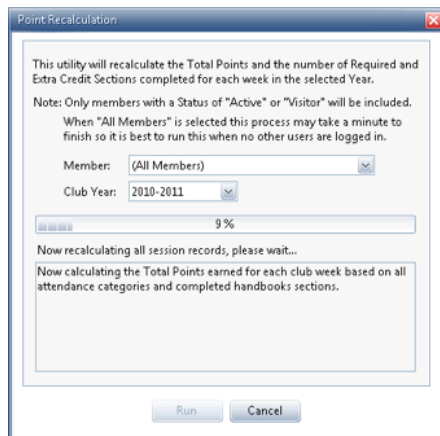
3. Once the particular item is located, use the right click pop-up menu to **Copy the Item Number**, **Copy the Description** or **Open the Inventory Item**


 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 **Search** button on the Fee dialog, **Select** and **Cancel** buttons are also displayed.

5.1.2.5 Recalculate Total Points


 Use this tool to recalculate Total Points and the number of Required and Extra Credit Sections completed for each member for each week in the selected **Club Year**. It also updates the Home page's Club Calendar Statistics. It is automatically invoked after [modifying handbook section point values](#). If glitches occur during data entry, it is possible that calculations in memory might not be posted correctly. This provides a way to be sure all records are correct.



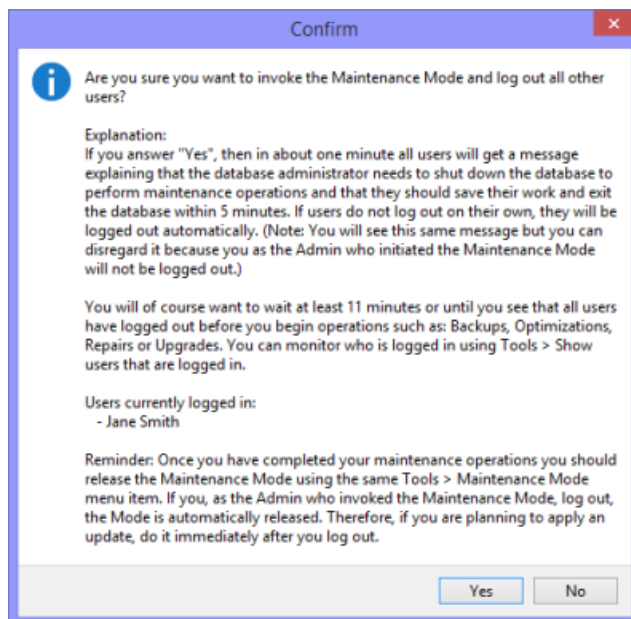
 Only members with a status of **Active** or **Visitor** will be included in the recalculations.

 It is best to run it when no other users are logged in. If **(All Members)** is selected it can take a minute to finish.

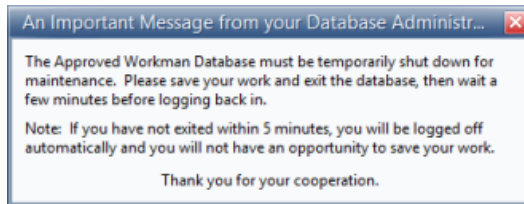
5.1.2.6 Invoke Maintenance Mode

 This feature applies only to those who are running AWdb over a local area network, or who have been set up with Remote Desktop access and therefore the possibility of multiple users being logged in simultaneously exists. For users with a single-user license, or with multiple licenses but are not operating over a LAN this topic is not applicable.

Those with Administrator permission will see the **Tools > Invoke the Maintenance Mode** menu item. Users with a normal "User" account will not see this menu item. Before performing some maintenance operations such as applying an update or running the Backup, Restore, Repair or Optimization utilities, first select **Tools > Invoke Maintenance Mode** to force everyone else to log out before proceeding with the maintenance. The following confirmation dialog gives an explanation of what will take place:



Any user who is logged in when maintenance mode is invoked will get a pop-up message (within about 1 minute) saying that the database must be temporarily shut down for maintenance and to save any work and exit. Here is an example of the message:












No other users will be able to log in while the administrator who invoked maintenance mode is logged in. A user that tries to log in will get a message explaining that maintenance is underway and to wait a few minutes to try again.

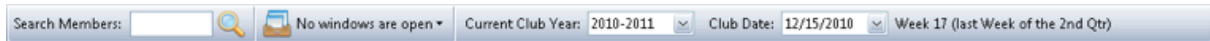
Once maintenance operations are completed, the Maintenance Mode should be released using the same tool. When the Admin who invoked the Maintenance Mode logs out, the Maintenance Mode is automatically released. Therefore, if an update needs to be applied, it should be done immediately after logging out.

5.1.3 The Help Menu


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

| Icon | Action | Description |
|---|---------------------------------|--|
|  | User Guide | Opens the AWdb User Guide located in the Approved Workman folder. |
|  | Online User Guide | Links to the online User Guide. An internet connection is needed. |
|  | Download User Guide | Links to the support page of the Approved Workman website to access a download of a PDF version of the latest User Guide. |
|  | License Info | Opens the license information including Customer ID and number of licenses. |
|  | Check for Updates | Begins the process of checking for updates for the database . |
|  | Approved Workman Forum | Links to the Forum which is an excellent place to get questions answered and see how others use AWdb. |
|  | 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 AWdb. |

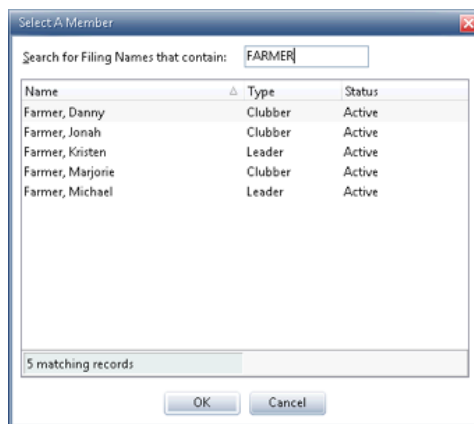
5.1.4 The Toolbar



Search Members


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


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 AWdb: 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.

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.

Member

Member Type: Clubber
 Status: Active
 Title: Miss
 First Name: Rachael
 Last Name: Clark
 Suffix:
 Nickname:
 Preferred: Rachael
 Pronunciation:
 Mailing Name: Miss Rachael Clark
 Birth Date: 7/6/2001
 Gender: Female
 Club Name: Trek
 Team Name:
 Team Color: Orange
 Leader Name:
 LIT for Club:

Household

Filing Name: Clark Family - Ethan/Rachael
 Mailing Name: Clark Family
 Parent Name(s): Mr and Mrs Clark
 Address Line 1: 15 Zagnut Lane
 City / State / Zip: Madison WI 53714
 Family Church: Prairie Revival
[Driving Directions](#)

Contact Info

| | | |
|------------|--------------------|-----------------|
| 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 |

Persons (other than parents) authorized to pick up the children:


Household Members

| | | | |
|--------------------|--------|--------|-----------------|
| Mr Ethan Clark | Age 15 | Active | Clubber Journey |
| Miss Rachael Clark | Age 13 | Active | Clubber Trek |

Browse Household Status: Active Created 12/9/2010 8:07:47 AM Modified 10/7/2014 2:02:31 PM by Jane

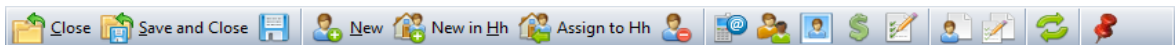
There is a lot of information packed into this one window, so it is divided into tabbed pages:

- **Main** - basic information, such as personal, household and contact information.
- **Misc** - other useful information about the member, such as registration, permission and medical info, visitor records, school name, etc.
- **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](#).
- **Donations** - all donations for the member. Open, delete, or create donation records.






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.



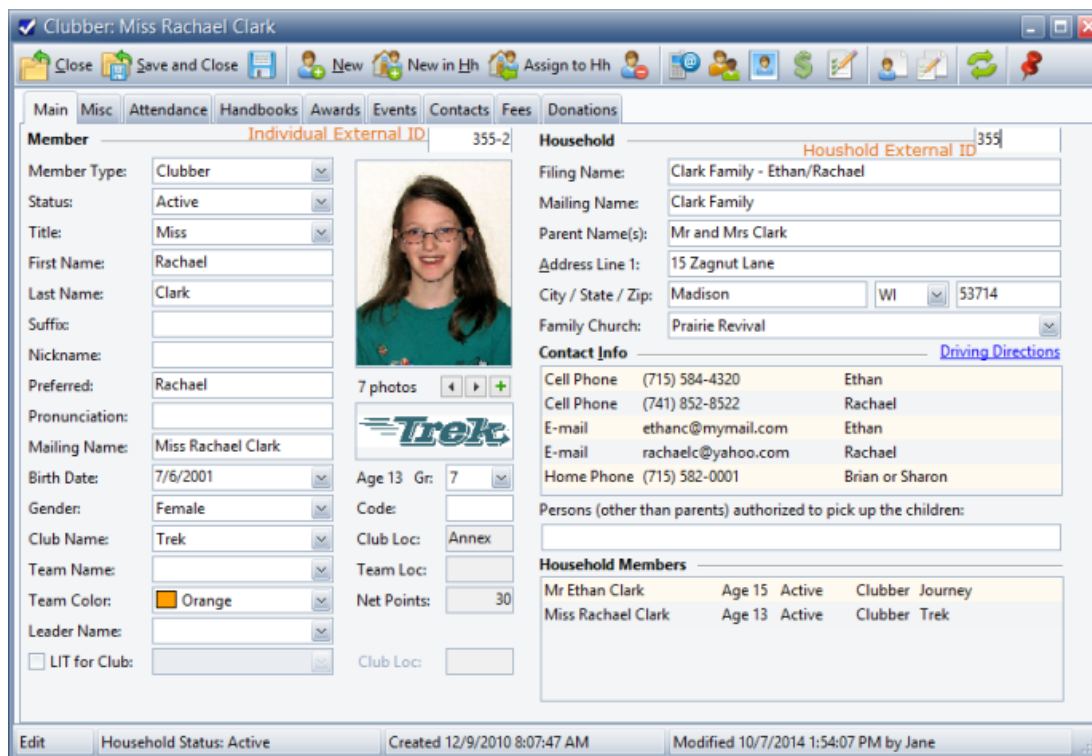
The table below describes what each button on the toolbar does.

| 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 Member | Opens the Member Window with blank/default values to create a new member (clubber or leader). |
|  | 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. |
|  | Delete Member | Removes the current member and closes the window. This process requires a confirmation. |
|  | Open E-Contacts | Opens the E-Contacts dialog to enter contact information for the household. |
|  | Add a Visitor | Opens the Add a Visitor dialog to add a visitor brought by the current member. |
|  | 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 member's family to manage fees and payments . |

| Icon | Action | Description |
|---|-----------------------------|--|
|  | Begin Reg. Process | Opens the Registration Window dialog for the member's family to manage registration related events. |
|  | Print Member Profile | Opens the Member Profile report dialog to print a member profile for the current member. |
|  | Print Reg. Form | Opens the Registration Form report dialog to print a registration form for the selected member's family. |
|  | Refresh | Refreshes the data in the window. |
|  | Stay on Top | Toggles whether or not the window stays on top of the main window. |

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.



Clubber: Miss Rachael Clark



Close Save and Close New New in Hh Assign to Hh

Main Misc Attendance Handbooks Awards Events Contacts Fees Donations

Member **Individual External ID** 355-2

Member Type: Clubber
 Status: Active
 Title: Miss
 First Name: Rachael
 Last Name: Clark
 Suffix:
 Nickname:
 Preferred: Rachael
 Pronunciation:
 Mailing Name: Miss Rachael Clark
 Birth Date: 7/6/2001
 Gender: Female
 Club Name: Trek
 Team Name:
 Team Color: Orange
 Leader Name:
 LIT for Club:

Age 13 Gr: 7
 Code:
 Club Loc: Annex
 Team Loc:
 Net Points: 30
 Club Loc:


 7 photos


Household **Household External ID** 355

Filing Name: Clark Family - Ethan/Rachael
 Mailing Name: Clark Family
 Parent Name(s): Mr and Mrs Clark
 Address Line 1: 15 Zagnut Lane
 City / State / Zip: Madison WI 53714
 Family Church: Prairie Revival [Driving Directions](#)

Contact Info

| | |
|---------------------------|-----------------|
| 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 |

Persons (other than parents) authorized to pick up the children:

Household Members

| | | | |
|--------------------|--------|--------|-----------------|
| Mr Ethan Clark | Age 15 | Active | Clubber Journey |
| Miss Rachael Clark | Age 13 | Active | Clubber Trek |

Edit Household Status: Active Created 12/9/2010 8:07:47 AM Modified 10/7/2014 1:54:07 PM by Jane

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](#).

- **Member Type** - **Clubber** or **Leader**.
- **Status** - **Active**, **Archived**, **Graduated**, **Inactive**, **Prospect** or **Visitor**. Setting a member's status is useful when [filtering grids](#) to show only selected members.
- **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**, **Nickname**, **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** will be calculated and is read-only.
- **Grade** - calculated using the birth date, but can be selected manually or changed if needed.
- **Gender** - set automatically if a gender specific title is used, but can be selected manually.
- **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.

- **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](#).



Try to always enter a **Title** and **Birth Date**. Selecting "Miss" or "Mr" derives the **Gender**. A **Birth Date** calculates the **Age**, which then derives the **Grade**. With **Grade** and **Gender**, **Club Assignment** is made.

- **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).

Clubber Specific Fields

The following fields are only visible if the **Member Type** is set to **Clubber**:

- **Club Loc** - read-only field displaying where the club meets as set up under **Admin > Club Setup > Club Names, Logos, Dues & Points**.
- **Team Loc** - read-only field displaying where the team meets as set up under **Admin > Club Setup > Team Names**.
- **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.
- **Leader Name** - selection options are based on active leaders. Selection list shows if the leader is an LIT, the leader's Club Name and Team Color to facilitate leader assignments.
- **LIT for Club** - indicates a clubber who serves as a LIT (Leader in Training, or Student Leader) in another club (such as a Trek or Journey clubber serving in Cubbies). This enables selection of a club where the LIT serves. It also creates the following changes to the record:
 - adds attendance records for the new (LIT) Club
 - adds a [Leadership tab](#) to track leadership service roles and training.

Leader Specific Fields

If the **Member Type** is set to **Leader**, the [Leadership Roles](#) grid shows in the lower left of the Member window and the [Leadership tab](#) is visible.

The screenshot displays the 'Member' window for Mr. Joseph Blakemore. The window title is 'Leader: Mr Joseph Blakemore'. The interface includes a toolbar with icons for Close, Save and Close, New, New in Hh, and Assign to Hh. Below the toolbar are tabs for Main, Misc, Attendance, Handbooks, Awards, Events, Contacts, Fees, Donations, and Leadership. The 'Main' tab is active, showing the following information:

Member Information:

- Individual External ID: 458-1
- Member Type: Leader
- Status: Active
- Title: Mr
- First Name: Joseph
- Last Name: Blakemore
- Suffix:
- Nickname:
- Preferred: Joseph
- Pronunciation:
- Mailing Name: Mr Joseph Blakemore
- Birth Date:
- Gender: Male

Household Information:

- Household External ID: 458
- Filing Name: Blakemore Family - Bonnie, Joseph, Claudia
- Mailing Name: Blakemore Family
- Parent Name(s): Mr Joseph and Claudia Blakemore
- Address Line 1: 6000 Rodeo Dr Apt 2
- City / State / Zip: Madison WI 53714
- Family Church: East Madison Baptist Church

Contact Info:

- Cell Phone: (325) 987-4510 (Joseph)
- E-Mail: joe@securityservices.com (Joseph)
- E-Mail: claudiab@gmail.com (Claudia)
- Home Phone: 608-555-3751 (Mr. Blakemore)

Leadership Roles for 2013-2014:

| Role | Club Name | Club Loc | Team Color | Team Name | Team Loc | Pri |
|-----------------|-------------|----------|-----------------------------|-----------|----------|-------------------------------------|
| Sparks Director | Sparks boys | A Win | <input type="checkbox"/> No | | | <input checked="" type="checkbox"/> |

Household Members:

| Name | Status | Role | Team |
|------------------------------|----------|---------|---------------|
| Mrs Claudia Blakemore | Inactive | Leader | T&T Adventure |
| Mr Joseph Blakemore | Active | Leader | Sparks boys |
| Miss Bonnie Blakemore age 10 | Inactive | Clubber | T&T Challenge |

At the bottom of the window, there is a status bar showing: Edit, Household Status: Active, Created 4/29/2010 2:47:19 PM, Modified 5/27/2014 1:34:58 PM by Jane.

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**".
- **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](#).

Contact Info

- **Cell Phone, E-Mail, Emergency, Home Phone, etc** - to add or edit contact information, double click a row in the Contact Info grid or click the [Phone/E-mail](#) button in the Member Window toolbar.
- **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.
- **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 Member Type is Clubber.

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 and Registration details, Medical and Visitor information, Notes and Miscellaneous items.


The screenshot shows the 'Misc' tab for a member named Mr. Ethan Clark. The interface includes a toolbar with buttons like 'Close', 'Save and Close', 'New', 'New in Hh', and 'Assign to Hh'. Below the toolbar are tabs for 'Main', 'Misc', 'Attendance', 'Handbooks', 'Awards', 'Events', 'Contacts', 'Fees', and 'Donations'. The 'Misc' tab is active, displaying several sections:


- Permissions and Registration:** Includes checkboxes for 'Activity Participation', 'Photo Use', 'Medical Release', 'Travel', and 'Registration current, registered: 8/29/2018'. There is also a field for 'Other: Reference for LIT' and a 'Has Uniform' section with a dropdown menu.
- Medical Information:** Includes checkboxes for 'Special Needs' and 'Include on Medical List report', a 'Last Tetanus Shot' field, and an 'Allergic To' field with 'ibuprofen/Motrin' entered.
- Visitor Information:** Contains two tables. The first table, 'Ethan visited our club on the following dates', has columns for 'Date', 'Brought By', and 'Club Visited'. The second table, 'The following Visitors were Guests of Ethan', has columns for 'Date', 'Visitor's Name', 'Club Visited', and 'Joined our club'.
- Miscellaneous:** Includes fields for 'School Name', 'Hobbies', '1st Language', '2nd Language', 'Date Joined', 'Flag', 'Preferred Bible Translation' (set to NKJV), 'Re-Birth Date', and 'Baptism Date'.

At the bottom of the window, there is a status bar showing 'Household Status: Active', 'Created 9/25/2013 2:02:51 PM', and 'Modified 6/14/2018 12:17:15 PM by Jane'.


Permissions and Registration

- **Permissions** - indicate consent has been given to: participate in **Activities** (such as Game Time), **Travel**, use a **Photo**, or **Release Medical** information. **Other** allows for an additional custom permission related item. When checked, a description can be entered.
- **Registration current, registered** - 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 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](#).


- **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.

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.

 For each field, the list of options in use for the family are displayed in the drop-down for easy access.

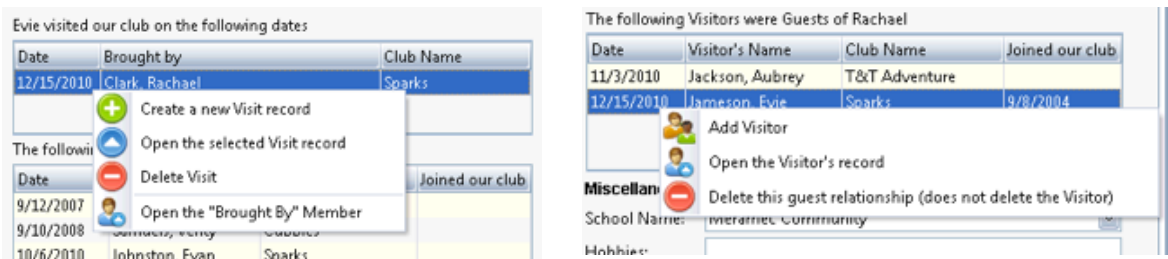
 When any of these fields are changed for one member of the household, an option is given to also use the new information for other members of the household that have the same current information.


Notes

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

Visitor Information


This section has two grids: one for recording 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.

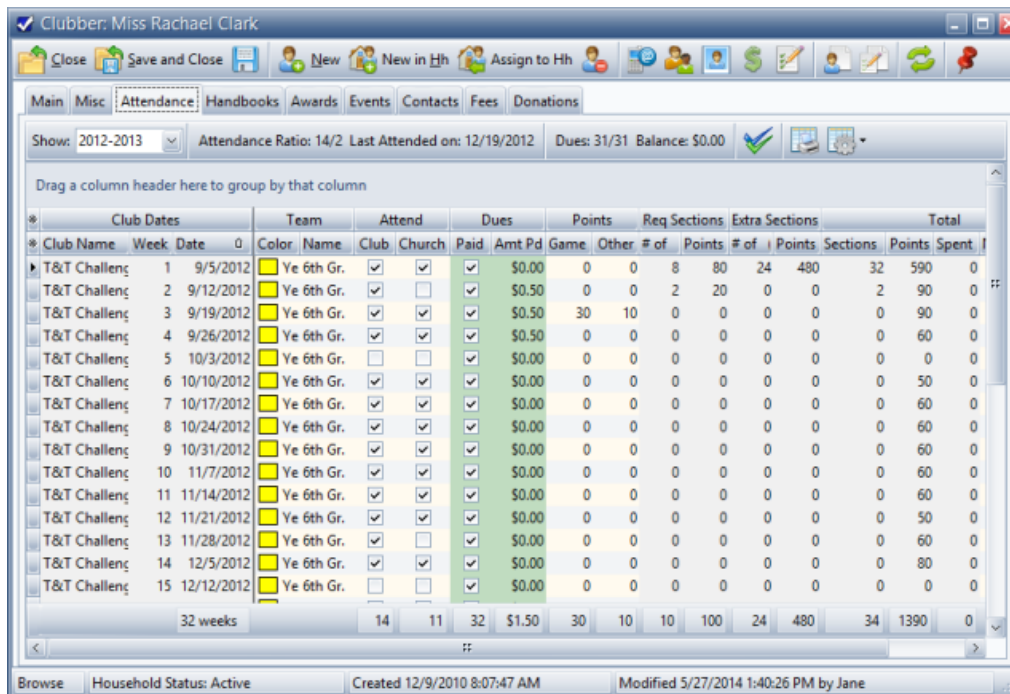
Miscellaneous

- **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.

- **Hobbies** - text field.
- **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.
- **Flag** - 6 color options. This is a custom way to categorize or "flag" particular members. Like the **Code** field on the **Main** tab, 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.
- **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.

5.2.4 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.



| Club Dates | | Team | | Attend | | Dues | | Points | | Req Sections | | Extra Sections | | Total | | | |
|---------------|------|------------|--------|------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|------|--------------|------|----------------|------|--------|----------|--------------|---|
| Club Name | Week | Date | Color | Name | Club | Church | Paid | Amt Pd | Game | Other | # of | Points | # of | Points | Sections | Points Spent | |
| T&T Challenge | 1 | 9/5/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 8 | 80 | 24 | 480 | 32 | 590 | 0 |
| T&T Challenge | 2 | 9/12/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.50 | 0 | 0 | 2 | 20 | 0 | 0 | 2 | 90 | 0 |
| T&T Challenge | 3 | 9/19/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.50 | 30 | 10 | 0 | 0 | 0 | 0 | 0 | 90 | 0 |
| T&T Challenge | 4 | 9/26/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.50 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 5 | 10/3/2012 | Yellow | Ye 6th Gr. | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| T&T Challenge | 6 | 10/10/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 50 | 0 |
| T&T Challenge | 7 | 10/17/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 8 | 10/24/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 9 | 10/31/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 10 | 11/7/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 11 | 11/14/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 12 | 11/21/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 50 | 0 |
| T&T Challenge | 13 | 11/28/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0 |
| T&T Challenge | 14 | 12/5/2012 | Yellow | Ye 6th Gr. | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 80 | 0 |
| T&T Challenge | 15 | 12/12/2012 | Yellow | Ye 6th Gr. | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 32 weeks | | | | | 14 | 11 | 32 | \$1.50 | 30 | 10 | 10 | 100 | 24 | 480 | 34 | 1390 | 0 |


 As with most grids in AWdb, 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.


There is a right click pop-up menu available on this grid to help with situations where unwanted attendance records exist. With a row selected, right click and choose one of the following:

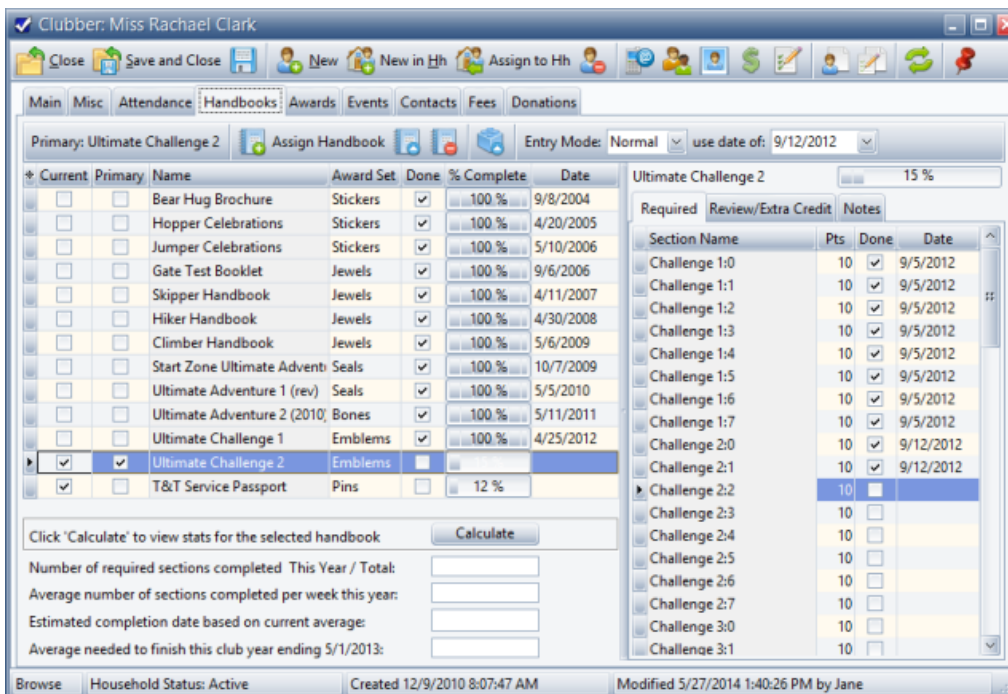
- **Delete all session records in the grid**
- **Delete all session records for (Club Name) in (Club Year)**
- **Delete the selected session record(s).**

 If there are two records for each date, use the option to **Select every other row, starting with this row** and then choose **Delete selected session record(s)**.

 Be cautious when using this selection. Do not delete any records that have data entered unless you are certain it isn't needed. Once session records are deleted, the process cannot be reversed!

5.2.5 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.







| Current | Primary | Name | Award Set | Done | % Complete | Date |
|-------------------------------------|-------------------------------------|-----------------------------|-----------|-------------------------------------|------------|-----------|
| <input type="checkbox"/> | <input type="checkbox"/> | Bear Hug Brochure | Stickers | <input checked="" type="checkbox"/> | 100 % | 9/8/2004 |
| <input type="checkbox"/> | <input type="checkbox"/> | Hopper Celebrations | Stickers | <input checked="" type="checkbox"/> | 100 % | 4/20/2005 |
| <input type="checkbox"/> | <input type="checkbox"/> | Jumper Celebrations | Stickers | <input checked="" type="checkbox"/> | 100 % | 5/10/2006 |
| <input type="checkbox"/> | <input type="checkbox"/> | Gate Test Booklet | Jewels | <input checked="" type="checkbox"/> | 100 % | 9/6/2006 |
| <input type="checkbox"/> | <input type="checkbox"/> | Skipper Handbook | Jewels | <input checked="" type="checkbox"/> | 100 % | 4/11/2007 |
| <input type="checkbox"/> | <input type="checkbox"/> | Hiker Handbook | Jewels | <input checked="" type="checkbox"/> | 100 % | 4/30/2008 |
| <input type="checkbox"/> | <input type="checkbox"/> | Climber Handbook | Jewels | <input checked="" type="checkbox"/> | 100 % | 5/6/2009 |
| <input type="checkbox"/> | <input type="checkbox"/> | Start Zone Ultimate Advent | Seals | <input checked="" type="checkbox"/> | 100 % | 10/7/2009 |
| <input type="checkbox"/> | <input type="checkbox"/> | Ultimate Adventure 1 (rev) | Seals | <input checked="" type="checkbox"/> | 100 % | 5/5/2010 |
| <input type="checkbox"/> | <input type="checkbox"/> | Ultimate Adventure 2 (2010) | Bones | <input checked="" type="checkbox"/> | 100 % | 5/11/2011 |
| <input type="checkbox"/> | <input type="checkbox"/> | Ultimate Challenge 1 | Emblems | <input checked="" type="checkbox"/> | 100 % | 4/25/2012 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Ultimate Challenge 2 | Emblems | <input type="checkbox"/> | 12 % | |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | T&T Service Passport | Pins | <input type="checkbox"/> | | |

| Section Name | Pts | Done | Date |
|---------------|-----|-------------------------------------|-----------|
| Challenge 1:0 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:1 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:2 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:3 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:4 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:5 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:6 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 1:7 | 10 | <input checked="" type="checkbox"/> | 9/5/2012 |
| Challenge 2:0 | 10 | <input checked="" type="checkbox"/> | 9/12/2012 |
| Challenge 2:1 | 10 | <input checked="" type="checkbox"/> | 9/12/2012 |
| Challenge 2:2 | 10 | <input type="checkbox"/> | |
| Challenge 2:3 | 10 | <input type="checkbox"/> | |
| Challenge 2:4 | 10 | <input type="checkbox"/> | |
| Challenge 2:5 | 10 | <input type="checkbox"/> | |
| Challenge 2:6 | 10 | <input type="checkbox"/> | |
| Challenge 2:7 | 10 | <input type="checkbox"/> | |
| Challenge 3:0 | 10 | <input type="checkbox"/> | |
| Challenge 3:1 | 10 | <input type="checkbox"/> | |

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 . |

- **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 easily 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.)
- **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.

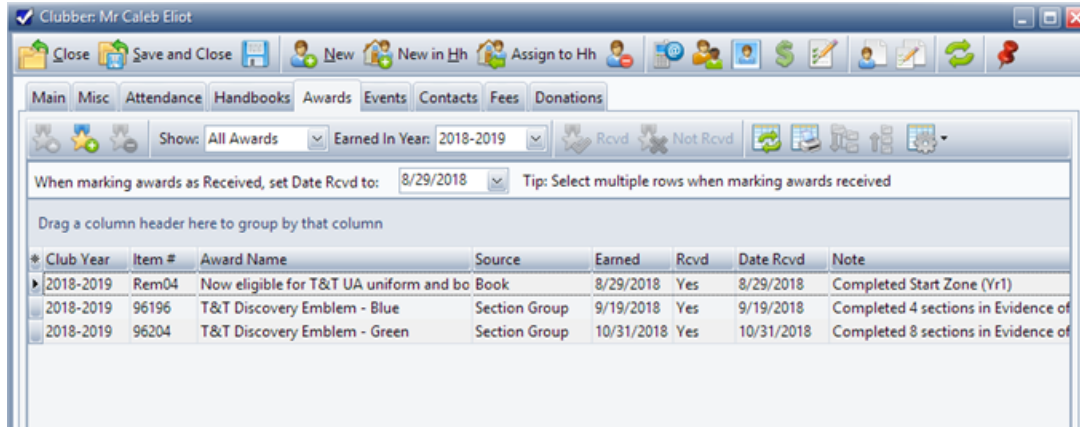
- **Handbook / Percent Complete** - displays information about the handbook currently selected in the main grid
- **Required**, and **Review/Extra Credit** tabs - Sections in the **required** group must be completed to get a book award. Sections in the **review** or **extra credit** group are optional. 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 marked in **Normal** mode.
 - **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.

5.2.6 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

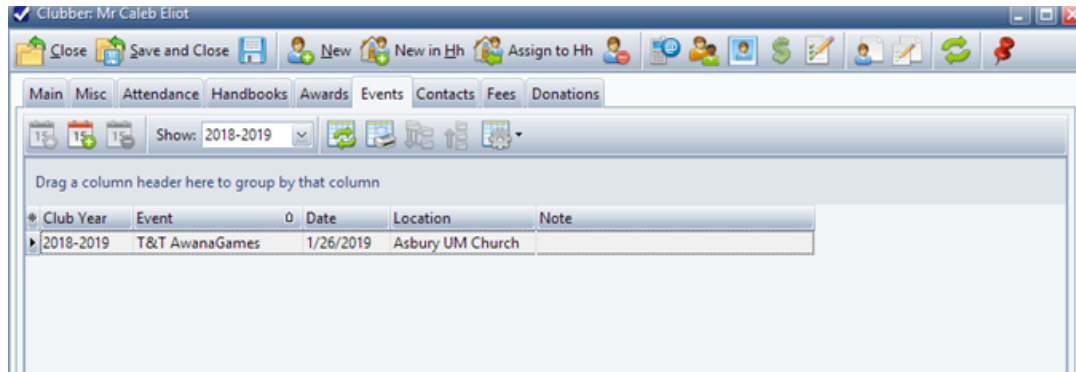
Besides the Member Window toolbar, there is another toolbar that is specific to the **Awards** page.

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|-------------|---------------------|--|
| | 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 <i>not</i> 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. |

5.2.7 Events



The **Events** tab provides an overview of events the clubber has attended. See the [Events Module](#) for additional information.



Toolbar

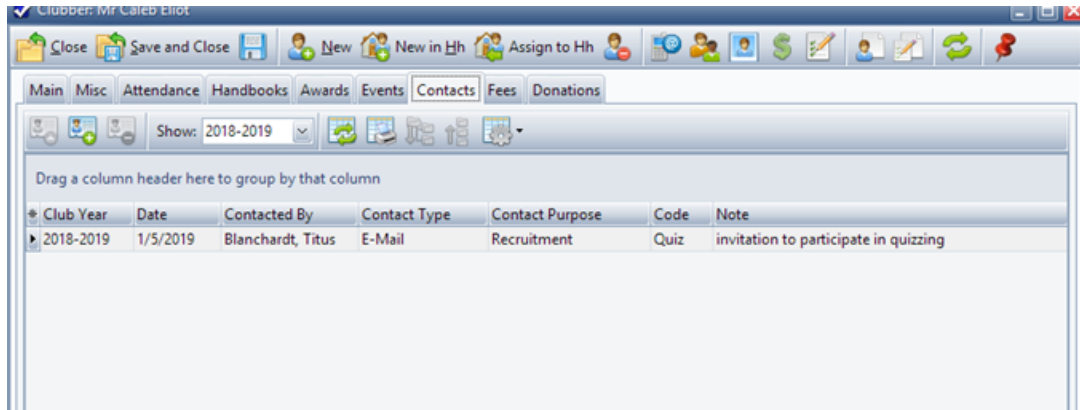
Besides the Member Window toolbar, there is another toolbar that is specific to the **Events** page.

| 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. |

5.2.8 Contacts



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




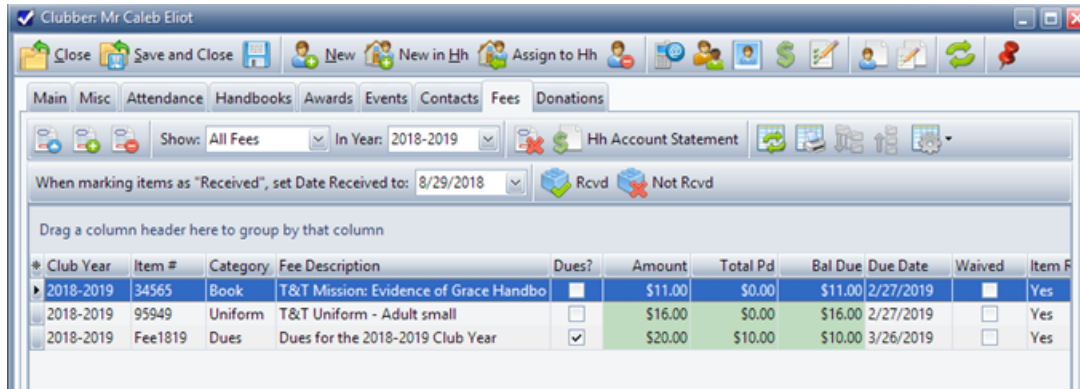
Toolbar

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. |









5.2.9 Fees

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



Toolbar

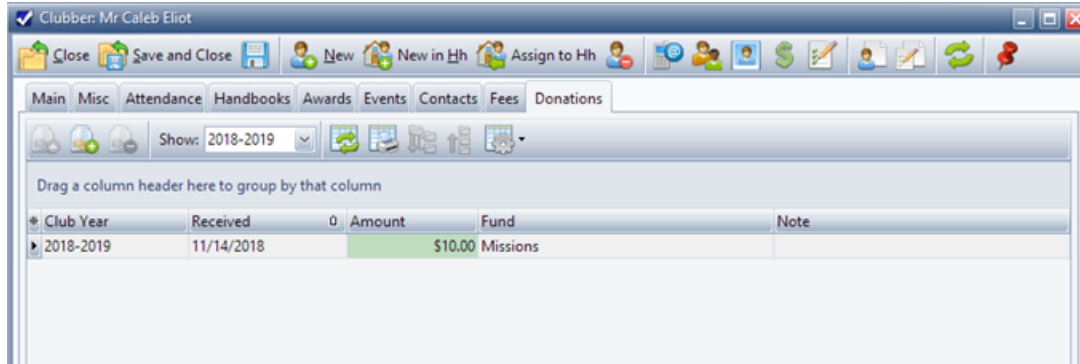
Besides the Member Window toolbar, there is another toolbar that is specific to the **Fees** page.

| 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. |
|  | 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. |
|  | Not Rcvd | Marks the selected fee item(s) as <i>not</i> 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. |

5.2.10 Donations



The **Donations** tab provides an overview of donations a clubber has made. See the [Donations Module](#) for additional information.



Toolbar

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

| Icon | Action | Description |
|-------------|------------------------|--|
| | Open Donation | Opens the selected donation in the Donation dialog . (Pressing the Enter key with a row selected or double clicking the row also opens the donation.) |
| | New Donation | Opens the Donation dialog with blank/default values to create a new donation for the member. |
| | Delete Donation | Removes the selected donation. |
| | 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. |

5.2.11 Leadership



This tab is only visible if the **Member Type** is **Leader** or if **LIT for club** is marked for a **Clubber**. It tracks the details of a leader's service and training, as well as listing clubbers assigned to the leader.

| Club Year | Leadership Role | Club Name | Church Name | From Date | To Date | Yr Count | Service Pin | Note |
|-----------|--------------------|-------------|-----------------------------|-----------|-----------|----------|-------------------------------------|------|
| 2009-2010 | Leader-in-Training | Sparks | East Madison Baptist Church | 9/16/2009 | 5/8/2010 | 1 | <input checked="" type="checkbox"/> | |
| 2010-2011 | Leader/Other | Sparks | East Madison Baptist Church | 8/11/2010 | 5/11/2011 | 1 | <input checked="" type="checkbox"/> | |
| 2011-2012 | Sparks Director | Sparks boys | East Madison Baptist church | 9/7/2011 | 4/25/2012 | 1 | <input checked="" type="checkbox"/> | |
| 2012-2013 | Sparks Director | Sparks boys | East Madison Baptist church | 9/5/2012 | 5/1/2013 | 1 | <input checked="" type="checkbox"/> | |
| 2013-2014 | Sparks Director | Sparks boys | East Madison Baptist church | 9/4/2013 | 4/23/2014 | 0 | <input type="checkbox"/> | |
| 2014-2015 | Sparks Director | Sparks boys | East Madison Baptist church | 9/3/2014 | 4/29/2015 | 1 | <input checked="" type="checkbox"/> | |
| 2015-2016 | Sparks Director | Sparks boys | A Sample Church | 9/9/2015 | 4/27/2016 | 1 | <input checked="" type="checkbox"/> | |
| 2016-2017 | Leader | Sparks | A Sample Church | 8/31/2016 | 4/26/2017 | 0 | <input type="checkbox"/> | |
| 2017-2018 | Leader | Sparks Boys | A Sample Church | 9/6/2017 | 5/9/2018 | 0 | <input type="checkbox"/> | |

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

AWdb can automatically create user-defined Training records when adding a new leader based on settings under [Admin > Generic Lookups > Leadership Training](#).

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|-------------------------------|--|
|  | 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 Window's [Main](#) page, 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. If re-order levels are set, items will be added to an order when the stock gets low. 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

With [the inventory set up](#) and [Inventory Tracking](#) preferences set, here's what happens:

When an award is triggered, the award item's Quantity in Stock is reduced. The item's new quantity in stock is now low enough to trigger it being added to an order. If there is not currently an open order, a new order is created and the item is added. When a new handbook is assigned, the quantity in stock for the book is reduced by one. If the new quantity in stock matches the re-order level, the book is added to the open order. This process happens for every award that is generated, book or uniform that is assigned or Fee that is manually entered.

After club, open and review the Order under **Inventory > Orders**. Add additional items and adjust the quantities if needed. [Place the order](#), using one the following:

- print the Order form and mail it or fax it to Awana headquarters
- print the Order form to a PDF file, then e-mail it to Awana headquarters
- print the Order form and use it as a worksheet to enter the items through Awana's Online Store

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.

To get the inventory set up correctly, 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 automatic ordering.
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](#), choose from the following options:
 - 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

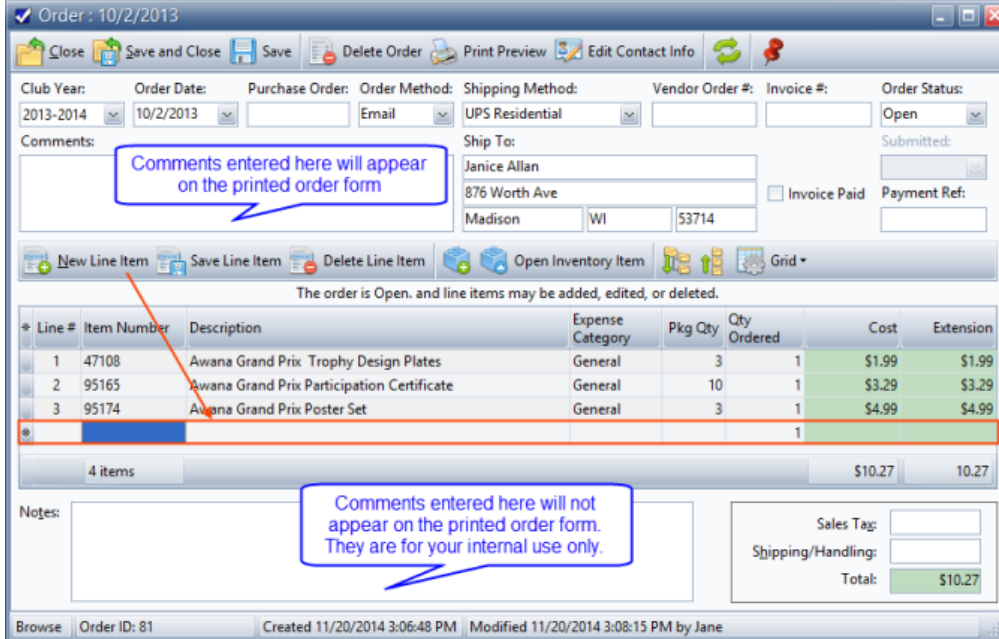
- d. When adding new Line Items to an Order, display the **Expense Category** column and populate it with the default value as set in the related Inventory record
2. Under [Admin > Options > Misc](#), choose default values to use to **Reduce the Inventory Qty in Stock** when a handbook or uniform is 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

If the [Inventory Tracking](#) preferences are set to automatically add line items to an open supply order when the Item's Order Level Quantity is reached, there might be an existing, open order that was already created. Otherwise, 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.



Order: 10/2/2013

Club Year: 2013-2014 | Order Date: 10/2/2013 | Purchase Order: | Order Method: Email | Shipping Method: UPS Residential | Vendor Order #: | Invoice #: | Order Status: Open

Comments: *Comments entered here will appear on the printed order form*

Ship To: Janice Allan, 876 Worth Ave, Madison, WI 53714

Buttons: New Line Item, Save Line Item, Delete Line Item, Open Inventory Item, Grid

The order is Open, and line items may be added, edited, or deleted.

| Line # | Item Number | Description | Expense Category | Pkg Qty | Qty Ordered | Cost | Extension |
|--------|-------------|--|------------------|---------|-------------|---------|-----------|
| 1 | 47108 | Awana Grand Prix Trophy Design Plates | General | 3 | 1 | \$1.99 | \$1.99 |
| 2 | 95165 | Awana Grand Prix Participation Certificate | General | 10 | 1 | \$3.29 | \$3.29 |
| 3 | 95174 | Awana Grand Prix Poster Set | General | 3 | 1 | \$4.99 | \$4.99 |
| | | | | | | 4 items | \$10.27 |

Notes: *Comments entered here will not appear on the printed order form. They are for your internal use only.*

Sales Tag: | Shipping/Handling: | Total: \$10.27

Browse | Order ID: 81 | Created 11/20/2014 3:06:48 PM | Modified 11/20/2014 3:08:15 PM by Jane

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 Church Purchase Order UPS Residential | | | | |
| 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 |

- 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.

Order: 5/8/2014

Club Year: 2012-2013 Order Date: 5/8/2014 Purchase Order: Order Method: Email Shipping Method: UPS Residential Vendor Order #: Invoice #: Order Status: Received

Comments: Ship To: Janice Allan, 876 Worth Ave, Madison, WI 53714 Submitted: Invoice Paid: Payment Ref:

The order is Received. Rcvd, Qty Rcvd, and Cost fields may be edited.

| Line # | Item Number | Description | Expense Category | Pkg Qty | Rcvd | Qty Ordered | Qty Rcvd | Qty on B/O | Cost | Extension |
|--------|-------------|--|------------------|---------|-------------------------------------|-------------|----------|------------|--------|-----------|
| 1 | 74190 | HangGlider Handbook with Audio CD-NKJV | Designated | 1 | <input checked="" type="checkbox"/> | 6 | 6 | 0 | \$9.99 | \$59.94 |
| 2 | 79468 | T&T UA Award Bone - Blue | General | 10 | <input checked="" type="checkbox"/> | 4 | 4 | 0 | \$0.99 | \$3.96 |
| 3 | 79476 | T&T UA Award Bone - Green | General | 10 | <input type="checkbox"/> | 4 | 0 | 4 | \$0.99 | \$3.96 |

3 items \$11.97 67.86

Total: \$67.86

Notes: Sales Tag: Shipping/Handling: Total: \$67.86

Edit Order ID: 81 Created 5/8/2014 12:41:26 PM Modified 5/27/2014 1:17:57 PM by Jane

- 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, Payments Received, and Unapplied 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**.

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 mother realizes that her child received a new book and says, "If you tell me how much I owe, I'll bring the money next week." You reply, "A book costs \$10.00, but let me check your balance." Since you are in the [Check-in Module](#), you type a few characters of the clubber's last name in the **Search** field and then press **Enter**. This hides all other names in the grid except for her child(ren). In the **Status bar** below the grid, you check the **Household Balance** which shows \$6.00. You click the link to open their [Household Ledger](#) for more details. You explain that she paid extra when she paid for a uniform. (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](#) for her to take home as a reminder.

She is a bit surprised and impressed that you keep such accurate records and decides to make a payment of \$10. The next week her daughter turns in the money with the Account Statement which has a note to donate the extra money to the scholarship fund. You open the Household Ledger, [post a payment](#) for \$10.00, and apply it to the book fee. This results in a \$4.00 unapplied payment. Since you know this is a donation and you want to zero the Household balance, 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 and thus a zero household balance.

Then in the [Donations Module](#), you create a new donation for \$4.00 and use "Scholarship Fund" as the **Purpose/Fund**. As you click **OK**, you say a quick prayer, thanking God for families who can afford to help support your church's Awana ministry, then focus on your next task!



Future functionality will eliminate this last step of creating a new record under the Donations Module, as this will be done automatically when you create the Fee record representing a "Donation" and post a payment to it.

5.5 Using AWdb to track VBS

AWdb can be used to track participants and attendance for a summer Bible School or Camp. The [Registration Form](#) can be customized for VBS/Camp use. Other reports such as Clubber Lists, Mailing Labels, Name Tags, etc. might also be helpful.



For Camp, follow the same instructions below, but substitute "Camp" for "VBS".

To set up the database:

1. Update to the newest version of AWdb.
2. Finish out the current Awana Club Year.



Do not proceed setting up VBS until the current club sessions are completed!

3. Go to [Admin > Generic Lookups](#) and select **Club Years**. Add a new record to represent the specific VBS year. For example, use **Club Year** "VBS 2019", **Logical Order** one greater than what is shown for the existing 2018-2019 Club Year, and "1" as the **Meeting Interval** value. Click the check mark at the bottom of the grid to post the new record.
4. Go to **Admin > Database Utilities** and run the [Backup Utility](#).
5. Click [New Year Setup](#) (also under **Admin > Database Utilities**) and follow these steps:
 - Step 1a: select "VBS 2019" as the **Club Year** and enter VBS **Starting** and **Ending Dates**.
 - Step 1b: review/add/edit the specific "Club Names" to use for VBS. Note: all records should have a **Base Club** value of "VBS". Keep in mind that, just like Awana, a specific **Grade** and **Gender** can only be assigned to a single specific club name.
 - Step 2, **Promotions**: be careful about whether or not to "**Promote each clubber's School Grade to the next level**". It's OK to do it for VBS; but if you DO, then DO NOT PROMOTE AGAIN when the New Year Setup is run for the next Awana club year.
 - Step 3, **Club Assignments**: select the appropriate **Club Name** for each **Grade** and **Gender**.
 - Step 4: review each field to decide how to handle each of the **resets**.
 - Step 5, click the **Begin Processing** button to generate the VBS weekly attendance records.

5.6 Using AWdb in Kiosk mode

AWdb 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 family name, or part of the name; 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**.

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.

Welcome to A Sample Church. Please check in. Current Club Date: 2/13/2019

Use this field to display instructions and/or announcements at the top of the screen

Step 1: Search for the family:
Type a family name and then press Enter or click Search

Eliot

🔍

Step 2: Select the family:
Select the family with members to check in and click Next. (If the family is not in the system please ask a staff member for assistance)

| Family | Parent/Guardian | City | Postal Code |
|---------------------|------------------|-------------|-------------|
| Eliot - Erin, Caleb | Mr and Mrs Eliot | Sun Prairie | 53462 |

Next >

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Welcome to A Sample Church. Please check in. Current Club Date: 2/13/2019

Use this field to display instructions and/or announcements at the top of the screen

Step 3: Select the family members who are present on 2/13/2019
Select each family member who is present, then click Done.

| Present | Name | Status | Mbr Type | Club Name |
|-------------------------------------|--------------|--------|----------|-----------|
| <input checked="" type="checkbox"/> | Eliot, Caleb | Active | Clubber | T&T Adv |
| <input checked="" type="checkbox"/> | Eliot, Erin | Active | Clubber | Journey |

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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 who is authorized to set up the kiosk, or one can be created for a specific computer that will be used as the kiosk. (For example, user name "Lobby" or "Lobby 1").

When [logging in](#) with an account where the type is set to "kiosk", the kiosk dialog opens in full-screen mode. 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 list.



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

Welcome to A Sample Church. Please check in. Current Club Date: 2/13/2019

Use this field to display instructions and/or announcements at the top of the screen

Enter any Instructions and/or Announcements you want to show at the top of the kiosk screen. Tip: If you want to change the font style and color, type your Instructions and/or Announcements in WordPad and then copy and paste the text into the field below.

Use this field to display instructions and/or announcements at the top of the screen

Color Theme Style: The Color Theme Style affects the appearance of the Kiosk Screen. This value is saved for each Kiosk User Account.

Number of Seconds Before Automatic Reset: If a kiosk user starts the check-in process but does not finish and just walks away, the automatic reset will return to Step 1 and clear the search field.

Allow Name Tag Label Printing
 Default Number of Labels Printed: << FUTURE (should be available in the next update): if you have a label printer attached to the Kiosk computer, you may opt to allow labels to be printed. Selecting this checkbox will make the "Print Labels" button visible.

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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.

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.


Chapter



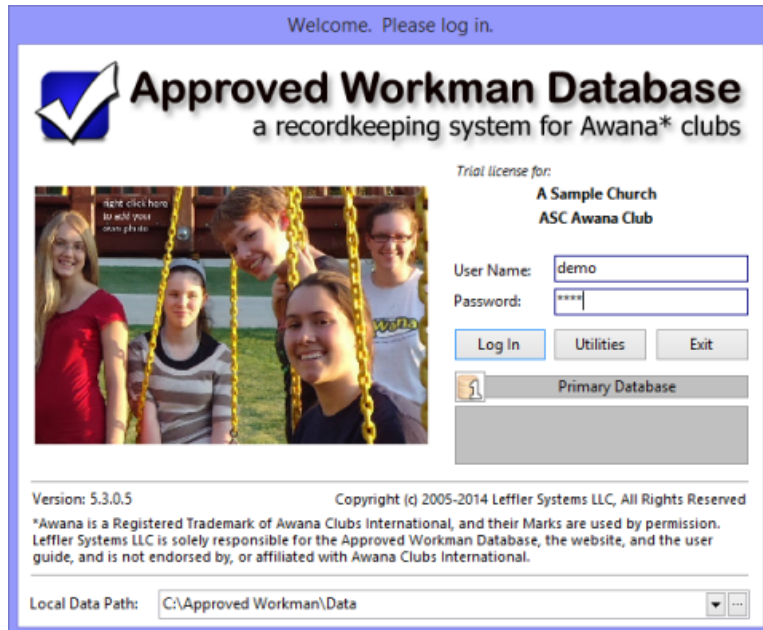
6

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! Even with a single-user license, multiple user accounts can be created under [Admin > Users](#).


This section explains the details of the Log-in dialog. For an overview, see [Logging in to AWdb](#).





- **License Info** - displays the church and club names that were given when registering the software.
- **User Name / Password** - credentials that allow access for a [user](#). For a Trial database, the User Name and Password are both "demo". 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 **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 number of licenses) are already logged in when a user attempts to log 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, the computer locked up, or there was an error message that forced AWdb to shutdown), this message will appear. In this case, reset the account and continue with the log in.

- **Utilities** - provides access to some utilities to reset accounts or run a database Restore or Repair. See the [Utilities](#) section for more details.
- **Exit** - closes the AWdb application without attempting to log in.
- **Primary Database/Secondary Database** - the Primary Database displays an icon showing a "1" and a label of "Primary Database". When using the [Database Check-out/Check-in](#) feature to get non-networked multi-user functionality, there might be additional information in this section. When logging in to the Primary Database when clubs are checked out, the names of all checked out clubs are listed. When logging in to a Secondary database, it displays an icon showing a "2" and a label of "Secondary Database" followed by the names of the clubs checked out to that specific Secondary database. If the Secondary database has already been checked back in to the Primary, it displays a label indicating "(All Clubs Are Locked)".
- **Version Number** - AWdb developers periodically release updates to fix defects and add features. When an update is applied, a newer version number will be displayed.
 -  The AWdb version is also displayed in the Main Window's status bar and under Help > About .
 -  If the maintenance and support plan is up-to-date, periodically [check for updates](#) in order to get the latest features and fixes! After logging in, click **Help > Check for Updates**.
- **Local Data Path** - location of the data folder. Typically, this never needs to be changed. However, after restoring a backup into a different location, it should be changed to access the restored database. Click the ellipsis button at the end to invoke a Browse for Folder dialog to select a different data folder.
- **Photo** - [personalize AWdb with a photo](#) from your own club.

6.1 Customizing the Photo

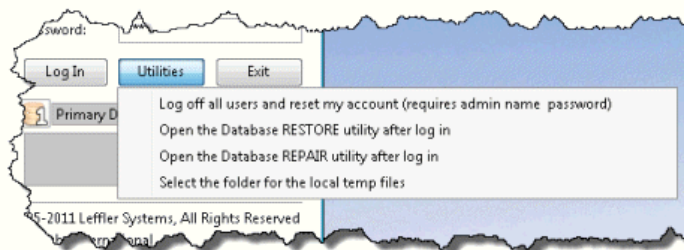
It's fun to see familiar faces when starting AWdb! Add a favorite photo for the Log-in dialog as follows:

1. Start the AWdb application.
2. Right click on the existing photo. Select **Load...** from the pop-up menu. An **Open** dialog appears.
3. Navigate to the photo of choice. Select it, then click **Open**. The new photo is displayed.

 If the image does not exist as a file, but is from a website or document, right click and "Copy" the image. Then right click in the Photo frame of the Log-in screen and select "Paste".

6.2 Utilities

The Utilities button provides access to some utilities directly from the log-in screen:



- **Log off all users and reset my account (requires admin name / password)** - used to handle the clean up when the database was unable to properly shut down and log off the current user (a computer or application locked up that forced AWdb to close unexpectedly, for example).
- **Open the Database RESTORE utility after log in** - used to restore from a backup when file corruption prevents access to the **Admin > Database Utilities** screen. Select this option and then log in as normal. The Backup/Restore dialog opens immediately after logging in.
- **Open the Database REPAIR utility after log in** - used to repair data files when the file corruption prevents access to the **Admin > Database Utilities** screen. Select this option and then log in as normal. The Repair dialog opens immediately after logging in.
- **Select the folder for the local temp files** - used in some special cases to specify a particular folder that can be excluded from anti-virus scans. When this option is selected, the current **Temp folder** appears at the bottom of the Log-in dialog along with a Browse for Folder dialog. Select the desired temp folder (such as the Approved Workman folder) and click **OK**. The new folder will be displayed. Log in as normal.




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. [Save these settings](#) for the page to default to the preferred 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. Thus, 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.
 -  For a printed list of visitors, use the [Visitor List](#) report in the Report Module.

- **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 night. Learn more in [The Club Calendar](#) section. 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.
- **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.
- **Photo** - [customize this photo](#) and then [save the layout](#) with the Photo tab selected to personalize the database!


7.1 Setting the Home Page's Layout

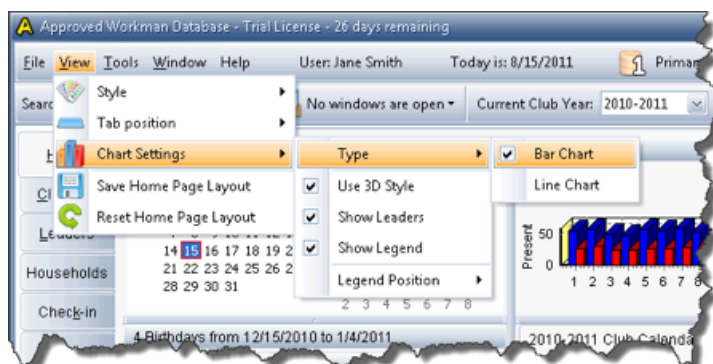
On the Home Page, there are several panels that can be resized by dragging the edges.

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**.

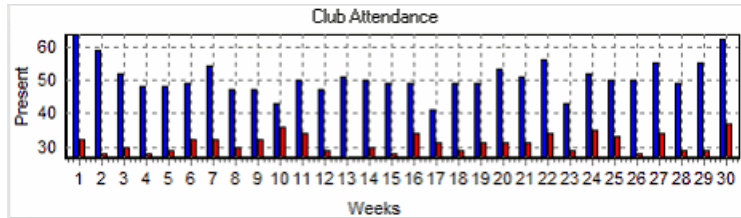
7.2 Customizing the Attendance Chart

 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.

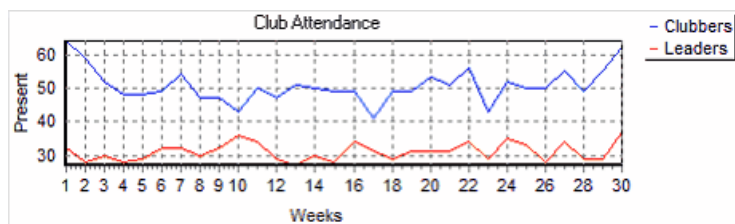


Choose from the following:

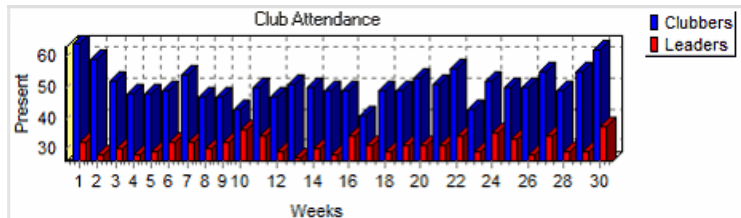
- **Type** - select from:
 - **Bar Chart** (default) -



- **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.

7.3 The Club Calendar

The Club Calendar tab includes a summary of each of the clubs on each club night 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.

The screenshot shows the '2011-2012 Club Calendar' window. The 'Show:' dropdown is set to 'Club Dates'. The grid is grouped by 'Date'. The selected date is 9/28/2011, which shows 54 Clubbers, 20 Leaders, 1 Visitor, and 107 Sections. The grid columns are: Club Name, Meeting Day, Wk, Qtr, Clubbers, Leaders, Visitors, Sections, Ratio, Theme, Offering Fund, and Note. The status bar at the bottom indicates: Clubbers: Low 6 High 54 Avg 40; Leaders: Low 2 High 22 Avg 16; Clubbers/Leader: 2.5/1.

| Club Name | Meeting Day | Wk | Qtr | Clubbers | Leaders | Visitors | Sections | Ratio | Theme | Offering Fund | Note |
|---|-------------|----|-----|----------|---------|----------|----------|-------|--------------|---------------|------|
| Date: 9/14/2011 (42 Clubbers, 4 Leaders, 1 Visitors, 88 Sections) | | | | | | | | | | | |
| Date: 9/21/2011 (52 Clubbers, 19 Leaders, 10 Visitors, 86 Sections) | | | | | | | | | | | |
| Date: 9/28/2011 (54 Clubbers, 20 Leaders, 1 Visitors, 107 Sections) | | | | | | | | | | | |
| Awana | Wednesday | 4 | 1st | 0 | 4 | 0 | 0 | | Family Night | Adopt-a-Club | |
| Cubbies | Wednesday | 4 | 1st | 3 | 2 | 0 | 0 | 1.5/1 | Family Night | Adopt-a-Club | |
| Journey 24-7 | Wednesday | 4 | 1st | 6 | 2 | 0 | 6 | 3/1 | Family Night | Adopt-a-Club | |
| Sparks | Wednesday | 4 | 1st | 9 | 3 | 0 | 27 | 3/1 | Family Night | Adopt-a-Club | |
| T&T Ult. Adv. | Wednesday | 4 | 1st | 6 | 3 | 0 | 10 | 2/1 | Family Night | Adopt-a-Club | |
| T&T Ult. Chall. | Wednesday | 4 | 1st | 19 | 4 | 0 | 28 | 4.8/1 | Family Night | Adopt-a-Club | |
| Trek | Wednesday | 4 | 1st | 11 | 2 | 1 | 36 | 5.5/1 | Family Night | Adopt-a-Club | |
| | | | | 54 | 20 | 1 | 107 | | | | |

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 Responsibilities**, and **Notes** can also be added/edited there.

7.4 Customizing the Photo

Personalize the graphic to display a photo of your own beloved clubbers on the Photo tab. There is no practical purpose for this, it's just fun to have a friendly photo!

To add a photo:

1. Select the **Home** tab on the Main Window.
2. Select the **Photo** tab in the lower, right panel of the Home Page.
3. Right click on the existing photo and select **Load...** from the pop-up menu. An Open dialog will appear.
4. Navigate to the photo of choice, select it, then click **Open**. The new photo will now be displayed.



If the image does not exist as a file, but is within a website or document, "Copy" the image from outside of AWdb then select "Paste" from the pop-up menu.

Chapter

8

8 The Clubbers Module
















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











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](#).

The screenshot shows the 'Approved Workman Database - A Sample Church' application. The main window displays a grid of clubbers with columns for Name, Club Name, Team Color, Team Name, Leader, Book Name, % Complete, Award Set, Transl, Attended, Last Attend, Pd Dues, Y/N, and Description. The grid lists 40 clubbers, including names like Adler, Andy; Allan, Jaqueline; and Clark, Rachel. The interface includes a search bar, a toolbar with various icons, and a sidebar with navigation options like Home, Leaders, Households, Check-in, Ledger, Awards, Events, Contacts, Donations, Reports, Inventory, and Admin. The status bar at the bottom indicates 'Version 5.8.0.6' and the data path 'C:\Users\Annette\Current Test Db\Testing for 5806\Approved Workman\Data'.

| 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. |
|  | 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 | Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) to display. |
|  | 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 status of the selected clubber(s) to one of the following: Active, Archived, Graduated, Inactive, Prospect, Visitor. |
|  | Set Team Color* | Sets the Team Color for the selected clubber(s). |
|  | Set Flag* | Sets a colored Flag for the selected clubber(s). |

| Icon | Action | Description |
|---|-------------------------------------|---|
|  | 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* | <p>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.</p> <p> Calculations must be turned "On" in order to populate the Primary E-mail Address column.</p> <p> 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.</p> |
|  | Copy Textible Phone Numbers* | <p>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.</p> <p> 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.</p> |
|  | 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.



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

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 "Archived", "Inactive", "Graduated", "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 Status or Club Name and Leadership Role, or setting 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.

The screenshot shows the 'Leaders' page in the 'Approved Workman Database - A Sample Church' application. The interface includes a menu bar (File, View, Tools, Window, Help), a search bar, and various filters. The main area displays a grid of leader information with columns for Name, Leader Details, and Primary Club Info. The grid is currently filtered to show 'Active' leaders.

| Name | | | Leader Details | | | | | | | Primary Club Info | | | | | |
|--------------------|------------|-----------|----------------|--------|--------|------------|------|--------|-----------|-------------------|------------------|-----------|-------------------------------|-----------|-----|
| Filing Name | Last | First | Flag | Status | Gender | Birth Date | Code | Points | Notes | Photo | Primary Role | Club Name | Team Color | Team Name | Bo |
| Allan, Jack | Allan | Jack | | Active | Male | 8/5/1984 | CPR | 200 | | | 1 Club Director | Journey | <input type="checkbox"/> None | | Tal |
| Allan, Janice | Allan | Janice | | Active | Female | 4/4/1996 | | 190 | | | 1 Helper | Journey | <input type="checkbox"/> None | | Tal |
| Arlington, Gavin | Arlington | Gavin | | Active | Male | | | 200 | | | 0 Club Director | T&T UC | <input type="checkbox"/> None | | |
| Arlington, Marissa | Arlington | Marissa | | Active | Female | 6/25/1982 | | 0 | | | 1 Game Director | Awana | <input type="checkbox"/> None | | |
| Blakemore, Claudia | Blakemore | Claudia | | Active | Female | 6/3/1982 | | 0 | | | 1 Store Director | Awana | <input type="checkbox"/> None | | |
| Blakemore, Joseph | Blakemore | Joseph | | Active | Male | 11/30/1978 | | 180 | | | 1 Team Leader | T&T UA | <input type="checkbox"/> None | | Tal |
| Blanchardt, Titus | Blanchardt | Titus | | Active | Male | 7/9/1992 | | 190 | | | 1 Club Director | Trek | <input type="checkbox"/> None | | Tal |
| Elden, Kelsey | Elden | Kelsey | | Active | Female | | | 170 | | | 1 Listener | Sparks | <input type="checkbox"/> None | | Tal |
| Farmer, Kristen | Farmer | Kristen | | Active | Female | | | 180 | Will help | | 1 Helper | Trek | <input type="checkbox"/> None | | |
| Farmer, Mike | Farmer | Michael | | Active | Male | | | 0 | | | 1 Pastor | Awana | <input type="checkbox"/> None | | Tal |
| Leffler, Emma | Leffler | Emma | | Active | Female | 10/18/1965 | CPR | 0 | | | 1 Helper | Awana | <input type="checkbox"/> None | | |
| Michaels, Lindsay | Michaels | Lindsay | | Active | Female | 10/27/1970 | | 0 | | | 1 Helper | Awana | <input type="checkbox"/> None | | |
| Moore, Dorothy | Moore | Dorothy | | Active | Female | 12/31/1970 | | 190 | | | 1 Listener | Sparks | <input type="checkbox"/> None | | |
| Newman, Marie | Newman | Marie | | Active | Female | 11/17/1965 | | 200 | | | 1 Listener | T&T UC | <input type="checkbox"/> None | | |
| Newman, Nicole | Newman | Nicole | | Active | Female | | | 180 | | | 1 Listener | T&T UA | <input type="checkbox"/> None | | |
| Rafferty, Sophia | Rafferty | Sophia | | Active | Female | 2/3/1995 | | 190 | | | 1 Helper | Cubbies | <input type="checkbox"/> None | | |
| Sabello, Rosalynn | Sabello | Rosalynn | | Active | Female | 1/26/1993 | | 210 | | | 1 Club Director | Cubbies | <input type="checkbox"/> None | | Tal |
| Smith, Alexander | Smith | Alexander | | Active | Male | 10/10/1969 | | 190 | | | 1 Team Leader | T&T UC | <input type="checkbox"/> None | | Tal |
| Tisdale, Jesse | Tisdale | Jesse | | Active | Male | 4/30/1962 | | 190 | | | 1 Team Leader | T&T UA | <input type="checkbox"/> None | | Tal |
| Watson, Haley | Watson | Haley | | Active | Female | 8/12/1987 | CPR | 180 | | | 1 Club Director | Sparks | <input type="checkbox"/> None | | Tal |
| Zelenka, Maria | Zelenka | Maria | | Active | Female | 4/5/1963 | | 0 | | | 1 Club Secretary | Awana | <input type="checkbox"/> None | | |
| Zelenka, Ted III | Zelenka | Thaddeus | | Active | Male | 9/20/1961 | | 0 | | | 0 Commander | Awana | <input type="checkbox"/> None | | Tal |

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|---|---|
|  | 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. |
|  | 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.) |
| | 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. |
|  | 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 . |
|  | Set Status* | Sets the status of the selected leader(s) to one of the following: Active, Archived, Graduated, 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* | Completed - marks the 'Training has been completed' check box on the Leadership tab of the member record for the selected member(s). Not completed - clears the check box for the selected member(s). |
| | Set Approved for Leadership* | Approved - marks the 'Approved for Leadership' check box on the Leadership tab of the member record for the selected member(s). Not approved - clears the check box for the selected member(s). |
| | Set Club Name and Leadership Role* | Opens the Leadership Roles dialog to set the Club Name and Leadership Role for the selected leader. (Can't use multi-select.) |
|  | Register and Post Payment* | Opens the Register and Post Payment Dialog to mark the Registration as current for the selected leader(s). |

| Icon | Action | Description |
|--|---------------------------------------|---|
|  | Convert Leader to LIT Clubber* | This is a one-time special-use function that is explained in the confirmation message dialog. |
|  | Copy E-mail Addresses* | <p>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.</p> <p> Calculations must be turned "On" to populate the Primary E-mail Address column.</p> <p> 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.</p> |
|  | Copy Textible Phone Numbers* | <p>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.</p> <p> 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.</p> |
|  | 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.

Service History



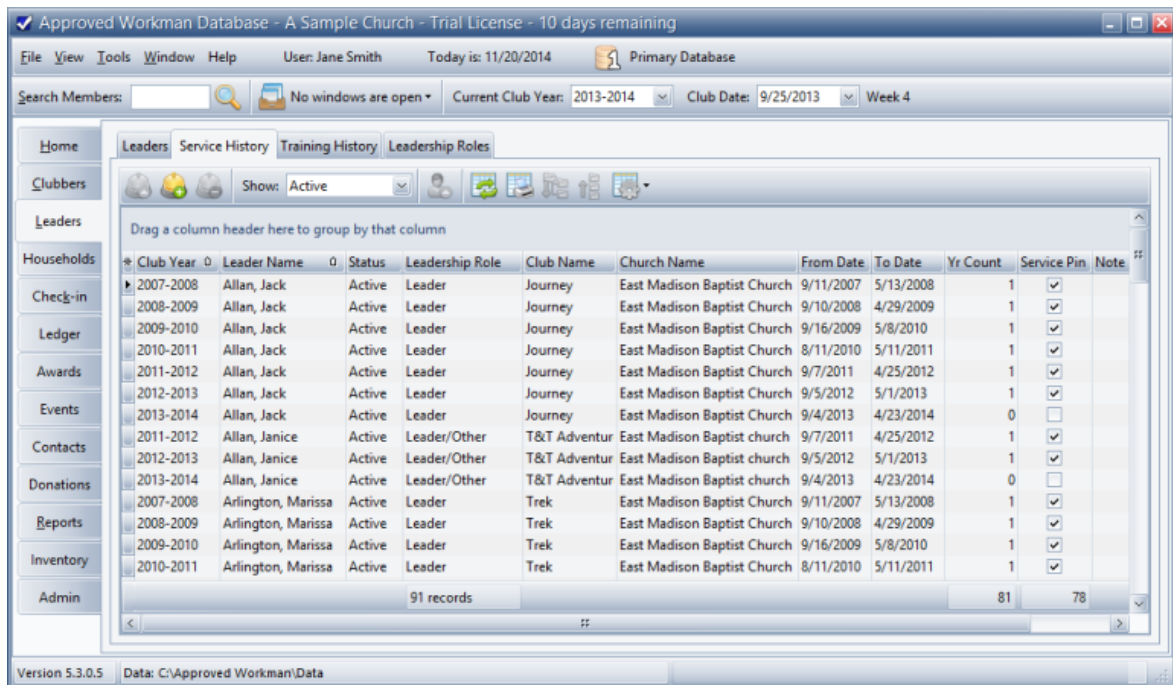
The **Service History** tab displays the service history details of each leader.

- Service History records are created automatically as leaders are created and assigned roles.



The [Optimize](#) procedure also provides the option to "Verify the Service History records.....".

- [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. |
| | 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. |
| | Open Member | Opens the member record associated with the selected service record. |
| | Grid Tools | Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data. |

Training History

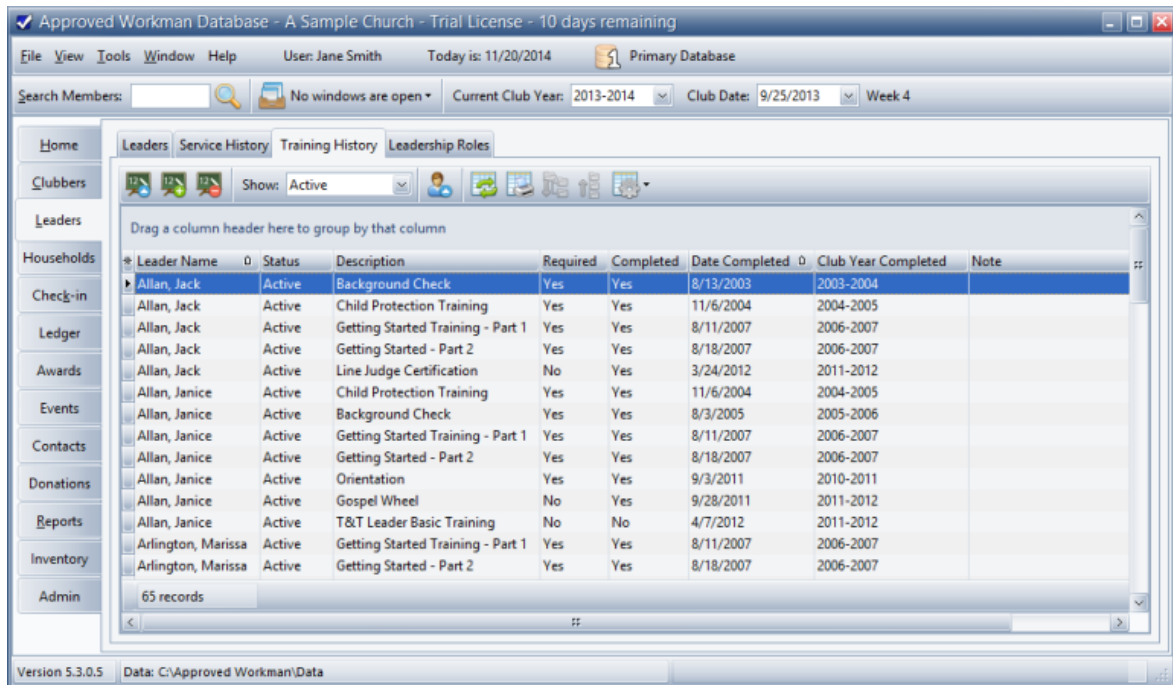







The **Training History** tab displays the training history details of each leader. It is easy to see which leaders have completed (or not completed) the required basic training and background checks.

- 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 or when choosing **"Verify the auto-add Leadership Training records"** during an [Optimize](#). Training items can also be set as **Required**. Set preferences under [Admin > Generic Lookups > Leadership Training](#).

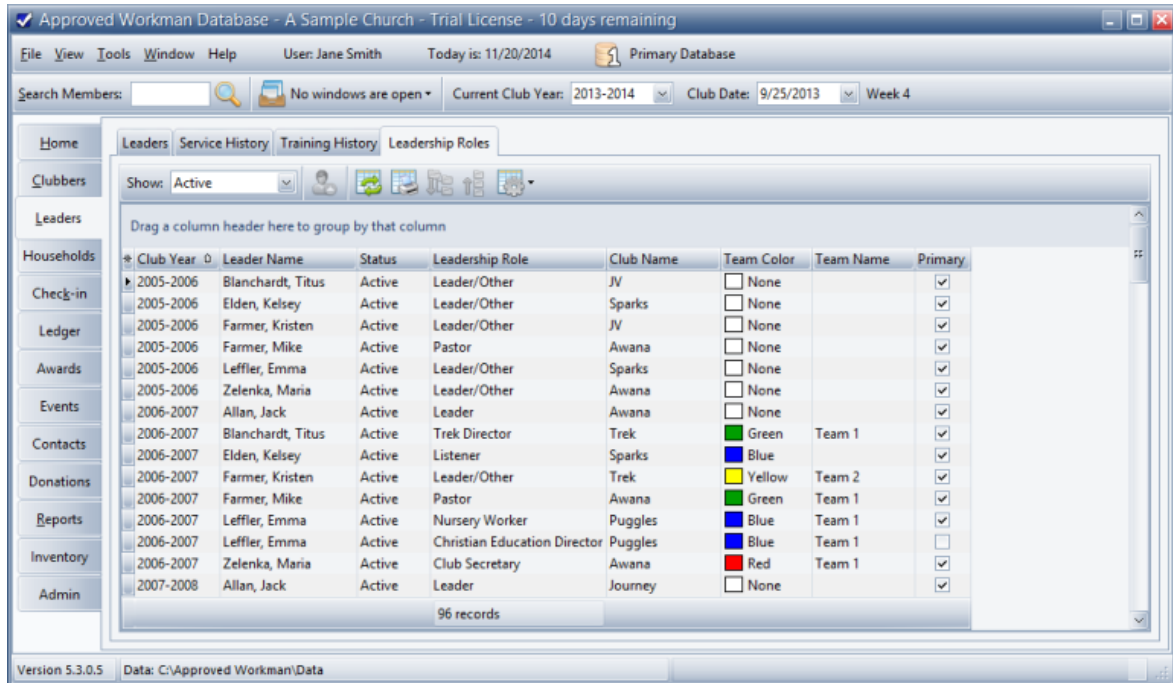
 [Customize the grid](#) for ad-hoc reports.





| 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. |
| | 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. |
|  | Open Member | Opens the member record associated with the selected training record. |
|  | 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.




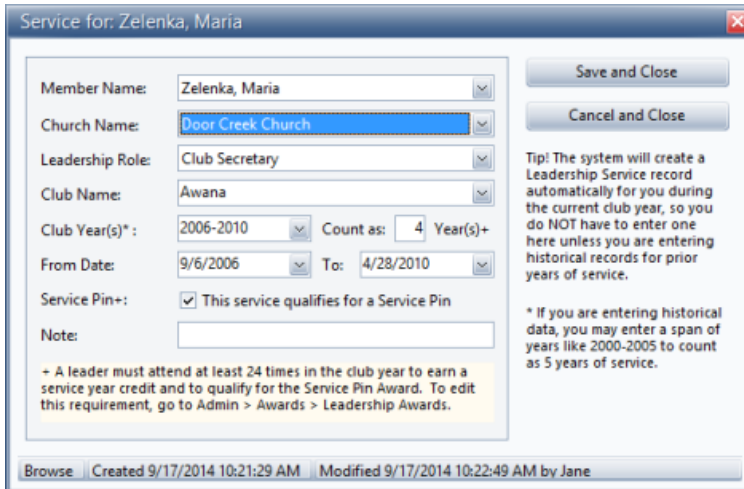
| Icon | Action | Description |
|---|--------------------|--|
| | Show | Filters the data in the grid based on Status. Select the boxes in the drop-down list to indicate the status(es) of leaders to display. |
|  | Open Member | Opens the member record associated with the selected role record. |
|  |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

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.



Service for: Zelenka, Maria

Member Name: Zelenka, Maria

Church Name: Door Creek Church

Leadership Role: Club Secretary

Club Name: Awana

Club Year(s)*: 2006-2010 Count as: 4 Year(s)+

From Date: 9/6/2006 To: 4/28/2010

Service Pin+: This service qualifies for a Service Pin

Note:


+ A leader must attend at least 24 times in the club year to earn a service year credit and to qualify for the Service Pin Award. To edit this requirement, go to Admin > Awards > Leadership Awards.

Tip! The system will create a Leadership Service record automatically for you during the current club year, so you do NOT have to enter one here unless you are entering historical records for prior years of service.

* If you are entering historical data, you may enter a span of years like 2000-2005 to count as 5 years of service.

Browse Created 9/17/2014 10:21:29 AM Modified 9/17/2014 10:22:49 AM by Jane

- **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, AWdb 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.

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.

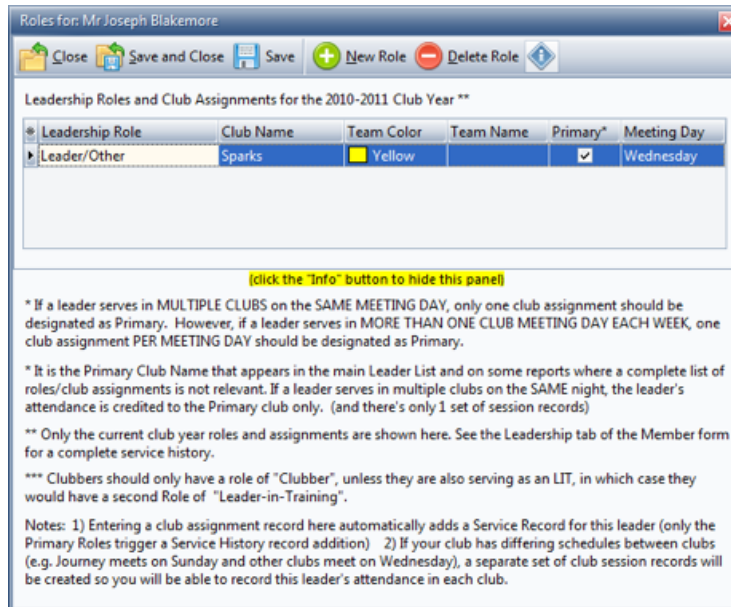
- **Member Name** - the leader who received training.
- **Description** - selection options are determined by [Admin > Generic Lookups > Leadership Training](#).
- **Required** - indicates if a leader must have the training.
- **Completed** - indicates if the leader has finished the training.
- **Date 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.

9.3 The Leadership Roles Dialog

From the [Main](#) tab of a leader's Member Record, right click on the Leadership Roles grid and select **Open the Roles Dialog**. This dialog shows the assigned roles for the current club year. Roles can be added or deleted using the buttons on the toolbar. Existing roles can be edited directly in the grid.



To add a role record, click the **New** button. A new row will be added to the grid. Directly enter the following fields:

- **Leadership Role** - selection options are determined by [Admin > Generic Lookups > Leadership Roles](#).
- **Club Name, Team Color, Team Name** - **Club Name** and **Team Name** selection options are determined by [Admin > Club Setup](#) records.
- **Primary** - indicates which role is primary (if more than one is listed). If a leader serves in multiple clubs on the same meeting day, only one club assignment should be designated as Primary. However, if a leader serves in multiple clubs that meet on different days, one club assignment per meeting day should be designated as Primary.
- **Meeting Day** - populated automatically based on the settings under [Admin > Club Setup > Club Names, Logos, Dues and Points](#).

Chapter

10

10 The Households Module



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

Approved Workman Database - A Sample Church

User: Jane Jones Today is: 4/14/2020 Primary Database

Search Members: [] No windows are open Current Club Year: 2018-2019 Club Date: 4/24/2019 Week 31 of 31 (last Week of the 4th Qtr)






Home Show: Active Open Household Ledger Open Registration Window Print Registration Form

Clubbers Drag a column header here to group by that column

| Household Filing Name | Household Mailing Name | Status | Parent(s) | Primary Phone | Primary E-Mail | Address Line1 | City | |
|---|------------------------|------------|----------------------------|----------------|------------------------|------------------------|--------|------|
| Clark Family - Ethan & Rachel | Ethan and Rachel Clark | Active | Mike and Jillian Clark | (715) 584-4321 | rachaelc@yahoo.com | 11 Zagnut Lane | Ma | |
| Cleveland - Brian | Cleveland Family | Active | Mr and Mrs Cleveland | | | | Ma | |
| Colson - Ryan | Colson Family | Active | Jeff and Wanda Colson | (608) 456-4566 | sonofcole@vikings.org | 38 Scotts Drive | Ma | |
| Corner - Amy | Corner Family | Active | Mr and Mrs Corner | | | | Ma | |
| Delemater - Deaana | Delemater Family | Active | Mr and Mrs Delemater | | | | Ma | |
| Douglas - Janetta | Douglas Family | Active | Ann Wells | 608-555-0659 | annw@annscakes.org | 1542 Washington Avenue | Ma | |
| Easton - Lucy, Lucas | Easton Family | Active | Henry and Michelle Easton | (608) 985-1247 | gems@comm.com | 882 Median Lake Drive | Ma | |
| Elden - Kelsey | Elden Family | Active | | (608) 555-1704 | kEplayer@aol.com | N1503 Mellenger Road | Dar | |
| Elliot - Erin, Caleb | Elliot Family | Active | Katrina Elliot | (608) 852-9639 | katrinaelliot@yahoo.co | 198 Larrameier Drive | Cot | |
| Farmer - Mike, Kristen, Danny, Marjorie | Farmer Family | Active | Michael and Kristen Farmer | (608) 555-1245 | thefarmers@hotmail.co | 895 Countyside Lane | Ma | |
| Member Name | Gender | Birth Date | Grade | Status | Member Type | Club Name | School | Code |
| Mr Daniel Farmer | Male | 2/12/2006 | 7 | Active | Clubber | Trek | | |
| Mr Jonah Farmer | Male | 6/10/2010 | 3 | Active | Clubber | T&T UA | | |
| Mrs Kristen Farmer | Female | | | Active | Leader | Trek | | |
| Miss Marjorie Farmer | Female | 1/29/2008 | 5 | Active | Clubber | T&T UC | | |
| Pastor Michael Farmer | Male | | | Active | Leader | Awana | | |
| Fuller - Duncan | Fuller Family | Active | James and Erin Fuller | (608) 555-8888 | fullerfamily3@sbcbglo | 27 North Shoreline | Ma | |
| Lang - Angie | Lang Family | Active | Mr and Mrs Lang | | | | Ma | |
| Lattimer - Jeff | Lattimer Family | Active | Tom and June Lattimer | (608) 222-3456 | | | Ma | |
| Leffler - Emma | Leffler Family | Active | | (608) 555-4981 | eleffler@mailbag.com | 256 Pebbel Drive | Ma | |
| Maxwell - Jane | Maxwell Family | Active | Mark and Jody Maxwell | (608) 555-2227 | maxout@sports.net | 2373 Aviator Street | Ma | |
| Messner - Katie | Messner Family | Active | Rebekah Messner | (608) 777-8989 | rebekah@genesispainti | 234 Comet Street | Ma | |
| Michaels - Lindsay | Michaels Family | Active | | (608) 258-1987 | lmichaels@juno.com | 9 Central Street | Ma | |
| Mifflin - Aaron | Mifflin Family | Active | Jonah and Esther Mifflin | (608) 777-1444 | mifflinmarvels@yahoo. | 8459 Percy Street | Cot | |
| Moore - Dorothy | Moore Family | Active | | (608) 999-8765 | domore@good.net | 6216 Major Avenue | Ma | |

41 households

Version 5.8.0.6 100 Data: C:\Users\Annette\Current Test Db\Testing for 5806\Approved Workman\Data

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|---------------------------------|---|
|  | 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.) |
| | Show | Filters the data in the grid based on Household Status. Select the boxes in the drop-down list to indicate the status(es) to display. |
|  | 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 family. |
|  | Grid Tools | Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data. |



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".

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, like: 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.

The screenshot shows the 'Approved Workman Database - A Sample Church - Trial License - 10 days remaining' window. The main area is the 'Check-in' grid, which is currently displaying data for the 'Lucas Easton' household. The grid has columns for Name, Team, Color, Attend (Club, Church), Dues (Paid, Armt Pd, Balance), Offering (Amount), and Total (Sections, Points). The 'Attend Church' column is currently hidden. The 'Dues' header band is visible, and the 'Offering' header band is also visible. The 'Total' header band is labeled 'Misc'. The grid shows 19 members in the household, with a total of 12 club attendances, 2 church attendances, 1 offering, and a total of \$0.00 in dues and \$42.00 in offerings. The 'Total' for the household is \$42.00, with \$17.00 in dues and \$0.00 in offerings. The 'Total' for the household is \$42.00, with \$17.00 in dues and \$0.00 in offerings. The 'Total' for the household is \$42.00, with \$17.00 in dues and \$0.00 in offerings.

| Name | Team | Color | Attend Club | Attend Church | Dues Paid | Dues Armt Pd | Dues Balance | Offering Amount | Total Sections | Total Points |
|-------------------|-------------|--------|-------------------------------------|-------------------------------------|-----------|--------------|--------------|-----------------|----------------|--------------|
| Alen Mikayla | Sparks girl | Blue | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 2 | 190 |
| Alen Dorothy | Sparks girl | Red | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$16.50 | \$0.00 | \$0.00 | 2 | 195 |
| Allan Trevor | Sparks boy | Red | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 5 | 195 |
| Allan Jaqueline | Sparks girl | Blue | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 3 | 155 |
| Brackenhein Kevin | Sparks boy | Green | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 3 | 165 |
| Carson Ben | T&T Chall | Green | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 0 | 165 |
| Clark Ethan | Journey | Green | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 0 | 85 |
| Clark Rachael | Trek | Orange | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 0 | 0 |
| Dixon Myra | T&T Adve | Green | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 0 | 115 |
| Easton Lucas | T&T Adve | Yellow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 9 | 150 |
| Jenning Sarah | T&T Chall | Green | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 0 | 110 |
| Jones Jeremy | T&T Adve | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 0 | 80 |
| Kaedle Stephanie | Journey | None | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 0 | 30 |
| Loomis Dennis | Sparks boy | Green | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 2 | 135 |
| Maretti Michael | Trek | None | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 1 | 10 |
| Maretti Anna | Trek | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | \$0.00 | 1 | 30 |
| Sabello Nora | Sparks girl | Red | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 2 | 85 |
| Thrace Miranda | Trek | None | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$16.50 | \$0.00 | \$0.00 | 1 | 10 |
| Uppenheim James | Sparks boy | Green | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | \$17.00 | \$0.00 | \$0.00 | 2 | 110 |

The sidebar on the right shows a list of sections for 'Ultimate Adventure 1 (2010)'. The sections are listed with their required points, whether they are done, and the date they were completed.

| Section Name | Pts | Done | Date |
|---------------|-----|-------------------------------------|-----------|
| Discovery 1:0 | 10 | <input checked="" type="checkbox"/> | 9/18/2013 |
| Discovery 1:1 | 10 | <input checked="" type="checkbox"/> | 9/18/2013 |
| Discovery 1:2 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Discovery 1:3 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Discovery 1:4 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Discovery 1:5 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Discovery 1:6 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Discovery 1:7 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Discovery 2:1 | 10 | <input type="checkbox"/> | |
| Discovery 2:2 | 10 | <input type="checkbox"/> | |
| Discovery 2:3 | 10 | <input type="checkbox"/> | |
| Discovery 2:4 | 10 | <input type="checkbox"/> | |
| Discovery 2:5 | 10 | <input type="checkbox"/> | |
| Discovery 2:6 | 10 | <input type="checkbox"/> | |
| Discovery 2:7 | 10 | <input type="checkbox"/> | |
| Discovery 3:0 | 10 | <input type="checkbox"/> | |
| Discovery 3:1 | 10 | <input type="checkbox"/> | |
| Discovery 3:2 | 10 | <input type="checkbox"/> | |
| Discovery 3:3 | 10 | <input type="checkbox"/> | |
| Discovery 3:4 | 10 | <input type="checkbox"/> | |
| Discovery 3:5 | 10 | <input type="checkbox"/> | |
| Discovery 3:6 | 10 | <input type="checkbox"/> | |
| Discovery 3:7 | 10 | <input type="checkbox"/> | |

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 which are 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.

- 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 check box columns' point values under [Admin > Club Setup > Club Names, Logos, Dues and Points](#).
- 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.
- Save the desired settings! After adjusting the grid, click the [Grid](#) button in the toolbar and select **Save the current grid layout**. This ensures AWdb 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 AWdb 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:

- 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.

- 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).

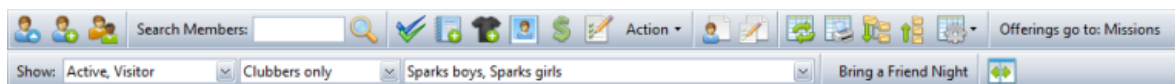
- When entering data from worksheets for handbook section completion, [filter the grid](#) to show a selected Primary Handbook (like Grace in Action, or Applesseed). Further filter the grid to show those who attended on the given club date (Attend = true). This makes it easy to [multi-select records](#) 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.








The Check-in Module is discussed in more detail by dividing it into three sections: [The Toolbar](#), [The Check-in Grid](#), and [The Sections Completed Grid](#).

11.1 The Toolbar

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



| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|-----------------------------------|---|
|  | 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 Member Window 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). |
|  | 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 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 status of the selected member(s) to one of the following: Active, Archived, Graduated, 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). |
|  | 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.. |
| | Offering | Displays how offerings will be credited if a specific Offering Fund is set for the current club date (under Admin > Club Setup > Club Calendars). |
| | 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.



Many of the actions are also available through 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.

| Name | Team | Attend | Dues | Offer | Total |
|----------------|--------|-------------------------------------|-------------------------------------|---------------|-----------|
| Clark, Ethan | Red | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 3 |
| Clark, Penny | Green | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Clark, Rachael | Yellow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.50 | 2 |
| Denimore, Lu | None | <input type="checkbox"/> | <input type="checkbox"/> | \$0.00 | 0 |
| Easton, Lucas | Blue | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 4 |
| Easton, Lucy | Yellow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Eliot, Caleb | Aqua | <input type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Eliot, Erin | Green | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Farmer, Dann | Red | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Farmer, Jonaf | Yellow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Farmer, Kriste | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | 0 |
| Farmer, Marjic | Red | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Farmer, Mike | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | 0 |
| Green, Alonzi | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | 2 |
| Green, Ginger | Blue | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | \$0.00 | 0 |
| Hassad, Sonn | None | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | 0 |
| Wenderson, D | Yellow | <input checked="" type="checkbox"/> | <input type="checkbox"/> | \$0.00 | 0 |
| Totals | | 24 | 5 | \$1.00 | 77 |

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.)

- Change the **Team Color** assignment by clicking the cell and selecting a different color. A change in **Team Color** applies to 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 to 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, or use the link below the Check-in grid in the status bar.

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.

The screenshot displays the 'Approved Workman Database - A Sample Church' interface. The main window shows a list of members with columns for Name, Club, Grade, Color, Attend, Dues, and Sections. The member 'Jaqueline Allan' is selected, and her record is expanded to show a 'Handbooks' tab with 'HangGlider' assigned. A callout box points to the 'Assign a new book' button, and another points to the 'Show/Hide handbook sections' button. The 'Required' tab for the 'HangGlider' handbook is visible, showing a grid of sections with columns for Section Name, Pts, Done, and Date.

| Section Name | Pts | Done | Date |
|-----------------|-----|-------------------------------------|------------|
| Rank Section 3 | 10 | <input checked="" type="checkbox"/> | 9/11/2013 |
| Rank Section 4 | 10 | <input checked="" type="checkbox"/> | 9/11/2013 |
| Rank Section 5 | 10 | <input checked="" type="checkbox"/> | 9/11/2013 |
| Rank Section 6 | 10 | <input checked="" type="checkbox"/> | 9/11/2013 |
| Rank Section 7 | 10 | <input checked="" type="checkbox"/> | 9/18/2013 |
| Rank Section 8 | 10 | <input checked="" type="checkbox"/> | 9/18/2013 |
| Red Jewel 1:1 | 10 | <input checked="" type="checkbox"/> | 9/18/2013 |
| Red Jewel 1:2 | 10 | <input checked="" type="checkbox"/> | 9/18/2013 |
| Red Jewel 1:3 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Red Jewel 1:4 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Green Jewel 1:1 | 10 | <input checked="" type="checkbox"/> | 9/25/2013 |
| Green Jewel 1:2 | 10 | <input checked="" type="checkbox"/> | 10/2/2013 |
| Green Jewel 1:3 | 10 | <input checked="" type="checkbox"/> | 10/2/2013 |
| Green Jewel 1:4 | 10 | <input checked="" type="checkbox"/> | 10/2/2013 |
| Red Jewel 2:1 | 10 | <input checked="" type="checkbox"/> | 10/9/2013 |
| Red Jewel 2:2 | 10 | <input checked="" type="checkbox"/> | 10/9/2013 |
| Red Jewel 2:3 | 10 | <input checked="" type="checkbox"/> | 10/16/2013 |
| Red Jewel 2:4 | 10 | <input checked="" type="checkbox"/> | 10/16/2013 |
| Green Jewel 2:1 | 10 | <input checked="" type="checkbox"/> | 10/30/2013 |
| Green Jewel 2:2 | 10 | <input checked="" type="checkbox"/> | 10/30/2013 |
| Green Jewel 2:3 | 10 | <input checked="" type="checkbox"/> | 11/13/2013 |
| Green Jewel 2:4 | 10 | <input type="checkbox"/> | |
| Red Jewel 3:1 | 10 | <input type="checkbox"/> | |

- **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 all the 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 [sorted](#) 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.

| Club Year | Household | Member Name | Mbr Type | Club Name | Team Name | Item # | Category | Fee Description |
|-----------|---|--------------------|----------|---------------|-----------|---------|----------|---|
| 2012-2013 | Blakemore Family - Blakemore, Yvonne | Blakemore, Yvonne | Clubber | T&T Advent. | 4th Gr. | Fee1213 | Dues | Dues for the 2012-2013 Club Year |
| 2012-2013 | Box Family | Box, Elle | Clubber | Sparks girls | K Gr. | 74190 | Book | HangGlider Handbook with Audio CD-NI |
| 2012-2013 | Brackenheimer Family | Brackenheimer, Kat | Clubber | T&T Advent. | 3rd Gr. | Fee1213 | Dues | Dues for the 2012-2013 Club Year |
| 2012-2013 | Brackenheimer Family | Brackenheimer, Kat | Clubber | T&T Advent. | 3rd Gr. | 80418 | Book | T&T UA Handbook - Book One - NKJV |
| 2012-2013 | Brackenheimer Family | Brackenheimer, Kat | Clubber | T&T Advent. | 3rd Gr. | 80215 | Uniform | T&T UA Uniform - Youth Large 14 |
| 2012-2013 | Brackenheimer Family | Brackenheimer, Ken | Clubber | Sparks boys | 1st Gr. | Fee1213 | Dues | Dues for the 2012-2013 Club Year |
| 2012-2013 | Brackenheimer Family | Brackenheimer, Ken | Clubber | Sparks boys | 1st Gr. | 74190 | Book | HangGlider Handbook with Audio CD-NI |
| 2012-2013 | Brackenheimer Family | Brackenheimer, Ken | Clubber | Sparks boys | 1st Gr. | 74421 | Uniform | Uniform Vest - Sparks Clubber - Large (10 |
| 2012-2013 | Bunker Family | Bunker, Samantha | Clubber | Sparks girls | 2nd Gr. | Fee1213 | Dues | Dues for the 2012-2013 Club Year |
| 2012-2013 | Carson Family - Ben a Carson, Ben | Carson, Ben | Clubber | T&T Challenge | 5th Gr. | Fee1213 | Dues | Dues for the 2012-2013 Club Year |
| 2012-2013 | Carson Family - Ben a Carson, Ben | Carson, Ben | Clubber | T&T Challenge | 5th Gr. | 80531 | Book | T&T UC Handbook - Book One - NKJV |
| 2012-2013 | Carson Family - Ben a Carson, Christina | Carson, Christina | Clubber | Sparks girls | 2nd Gr. | Fee1213 | Dues | Dues for the 2012-2013 Club Year |

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|-------------------------------|---|
|  | 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). |
| | 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. |
|  | Open Member | Opens the member record for the person who incurred the selected fee. |
|  | 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 <i>not</i> 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 **Item Number** or **Description**. The lists are populated with any items marked to be used in Fee lists in the [Inventory record](#). When one is selected, the other field is filled in automatically. If an image exists, it is shown in the area below.
 - If needed, use the **Search** button to locate an item from a pop-up dialog that includes a search field and photos to help select the correct item.
 - If an item isn't listed, but it IS in AWdb's main Inventory List, open the item from the [Inventory Module](#) and click the **Club Usage** tab. Ensure the appropriate **Use this item as a choice in any...** **drop-down list** options are 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.
 -  To create other fees, instead of clicking **Save and Close**, 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** button - opens the Household Ledger for the member who incurred the fee. The Fee dialog automatically saves and closes, then the [Household Ledger](#) opens.
-  The item's **Qty in Stock** is reduced when the fee is saved, if the [automatic inventory reduction feature is turned on](#) and a matching Inventory record exists.

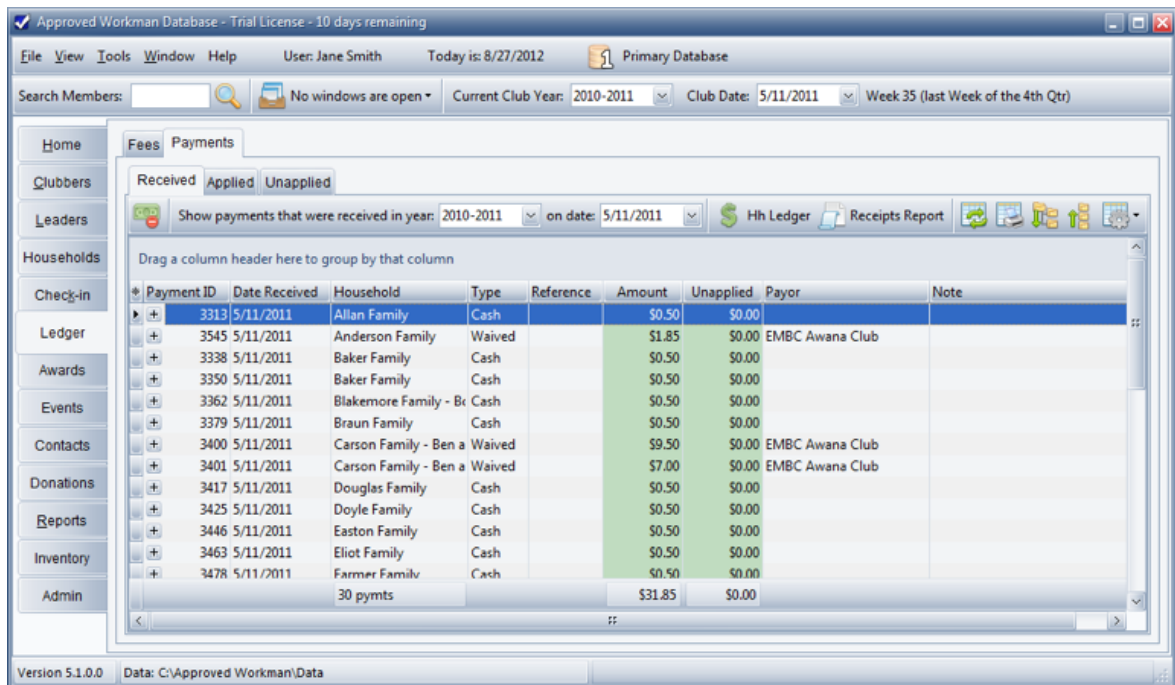
12.2 Payments

 The **Ledger > Payments** tab shows payments for all households in the database. The payments are shown in three different grids, as described below, to easily analyze data.






Received Payments

The **Received** tab grid shows all payments that have been received. It defaults to showing only payments received for the Current Club Date. A different date can be selected or choose to show "All Dates".

To the left of each payment row is a symbol (a plus sign or arrow). Click this to expand a payment. This shows all the fees to which the payment was applied. The applied payments are also listed on the **Applied** tab. If any part of the payment amount has not been applied, it is listed on the **Unapplied** tab.



| Payment ID | Date Received | Household | Type | Reference | Amount | Unapplied | Payor | Note |
|------------|---------------|-----------------------|--------|-----------|---------|-----------|-----------------|------|
| 3313 | 5/11/2011 | Allan Family | Cash | | \$0.50 | \$0.00 | | |
| 3545 | 5/11/2011 | Anderson Family | Waived | | \$1.85 | \$0.00 | EMBC Awana Club | |
| 3338 | 5/11/2011 | Baker Family | Cash | | \$0.50 | \$0.00 | | |
| 3350 | 5/11/2011 | Baker Family | Cash | | \$0.50 | \$0.00 | | |
| 3362 | 5/11/2011 | Blakemore Family - Br | Cash | | \$0.50 | \$0.00 | | |
| 3379 | 5/11/2011 | Braun Family | Cash | | \$0.50 | \$0.00 | | |
| 3400 | 5/11/2011 | Carson Family - Ben a | Waived | | \$9.50 | \$0.00 | EMBC Awana Club | |
| 3401 | 5/11/2011 | Carson Family - Ben a | Waived | | \$7.00 | \$0.00 | EMBC Awana Club | |
| 3417 | 5/11/2011 | Douglas Family | Cash | | \$0.50 | \$0.00 | | |
| 3425 | 5/11/2011 | Doyle Family | Cash | | \$0.50 | \$0.00 | | |
| 3446 | 5/11/2011 | Easton Family | Cash | | \$0.50 | \$0.00 | | |
| 3463 | 5/11/2011 | Eliot Family | Cash | | \$0.50 | \$0.00 | | |
| 3478 | 5/11/2011 | Farmer Family | Cash | | \$0.50 | \$0.00 | | |
| 30 pymts | | | | | \$31.85 | \$0.00 | | |

| 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. |



On the **Payments** grid, [group](#) records into meaningful batches that will include item counts and subtotals. For example, drag the **Type** column header into the grouping area above the grid to see a count of cash payments, checks, and waived payments. The grand total of all payments is also listed in the grid footer.

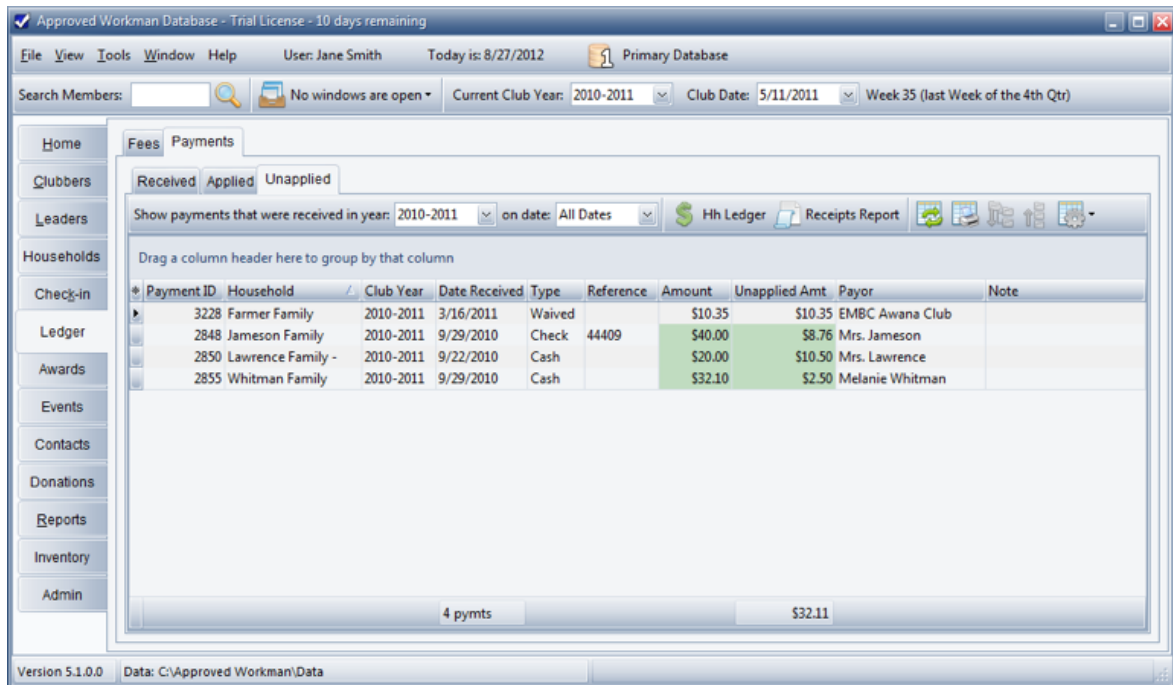
Applied Payments

If a payment, or part of a payment, was applied to a fee, it is listed on the **Applied** tab.

| Payment ID | Date Received | Household | Member Name | Club Name | Type | Reference | Applied | For Dues | Fee Description |
|------------|---------------|-----------------------|-------------|-------------|--------|-----------|---------------|-------------------------------------|----------------------------------|
| 3313 | 5/11/2011 | Allan Family | Trevor | Cubbies | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3545 | 5/11/2011 | Anderson Family | Kevin | T&T Challer | Waived | | \$1.85 | <input type="checkbox"/> | Sparks Hiker Handbook - KJV |
| 3338 | 5/11/2011 | Baker Family | Charles | Trek | Cash | | \$0.50 | <input type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3350 | 5/11/2011 | Baker Family | Margaret | Journey | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3362 | 5/11/2011 | Blakemore Family - Bk | Bonnie | Sparks | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3379 | 5/11/2011 | Braun Family | Matthew | Journey | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3401 | 5/11/2011 | Carson Family - Ben a | Benjamin | T&T Advent | Waived | | \$7.00 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3400 | 5/11/2011 | Carson Family - Ben a | Christina | Sparks | Waived | | \$9.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3417 | 5/11/2011 | Douglas Family | Janetta | Trek | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3425 | 5/11/2011 | Doyle Family | Rose | T&T Advent | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3446 | 5/11/2011 | Easton Family | Lucinda | T&T Advent | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3463 | 5/11/2011 | Eliot Family | Erin | T&T Advent | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| 3478 | 5/11/2011 | Farmer Family | Daniel | T&T Advent | Cash | | \$0.50 | <input checked="" type="checkbox"/> | Dues for the 2010-2011 Club Year |
| | | | | | | | 30 items paid | | \$31.85 |

UnApplied Payments

If a payment, or part of a payment, has not been applied to a fee, it is listed on the **Unapplied** tab.



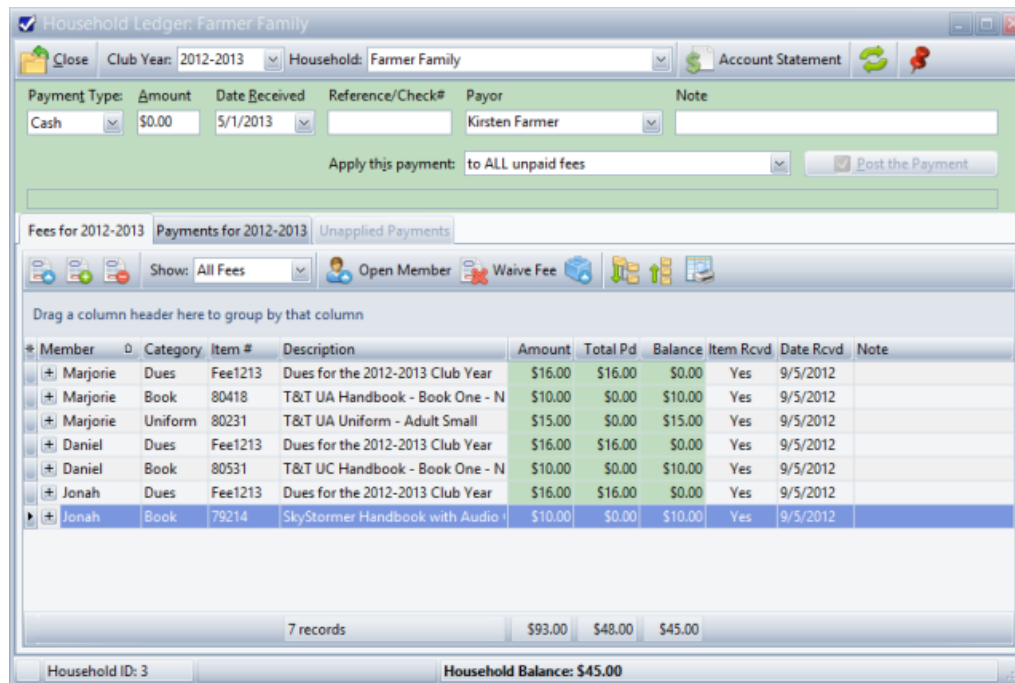
12.3 The Household Ledger





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

Open a selected member's Household Ledger from the:

- [Check-in Module toolbar](#): **Household Ledger** button
- [Check-in Module](#) status bar: link beneath the grid
- [Clubbers Module](#), [Leaders Module](#), [Households Module](#), [Ledger > Fees](#) or [Ledger > Payments](#) 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 (in the topmost toolbar) | 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. |
|  | Account Statement | Opens the Household Account Statement report dialog. The selection criteria defaults to the selected household. |
|  | Refresh | Refreshes the data that is displayed. This is not normally needed, but can be used when running the database over a network to be sure that edits made by other users are reflected in the current data. |
|  | Stay On Top | Toggles whether or not the window will stay on top of the main window. |

- To quickly filter the contents of all the grids in the three tabs, use the **Club Year** drop-down list to determine which club year's ledger information is displayed. Use the **Household** drop-down list to quickly switch to a different household.

Fees



Besides fees for dues, a fee should be created whenever a member buys or earns an item for which payment is expected. Fees for dues, handbooks, and uniforms are usually automatically created when a clubber's registration is set as current and when a new handbook or uniform is assigned. However, other fees, like bags and replacement books and awards, need to be created manually. Fees for awards are generally not necessary, since they are given to clubbers free of charge. View a list of all fees by clicking the **Fees for [club year]** tab.

Fees Toolbar:


| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|-------------|----------------------------|---|
| | 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. |
| | 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. |
| | Not Rcvd | Marks the selected fee item(s) as <i>not</i> having been received by the member yet. |
| | 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.) |

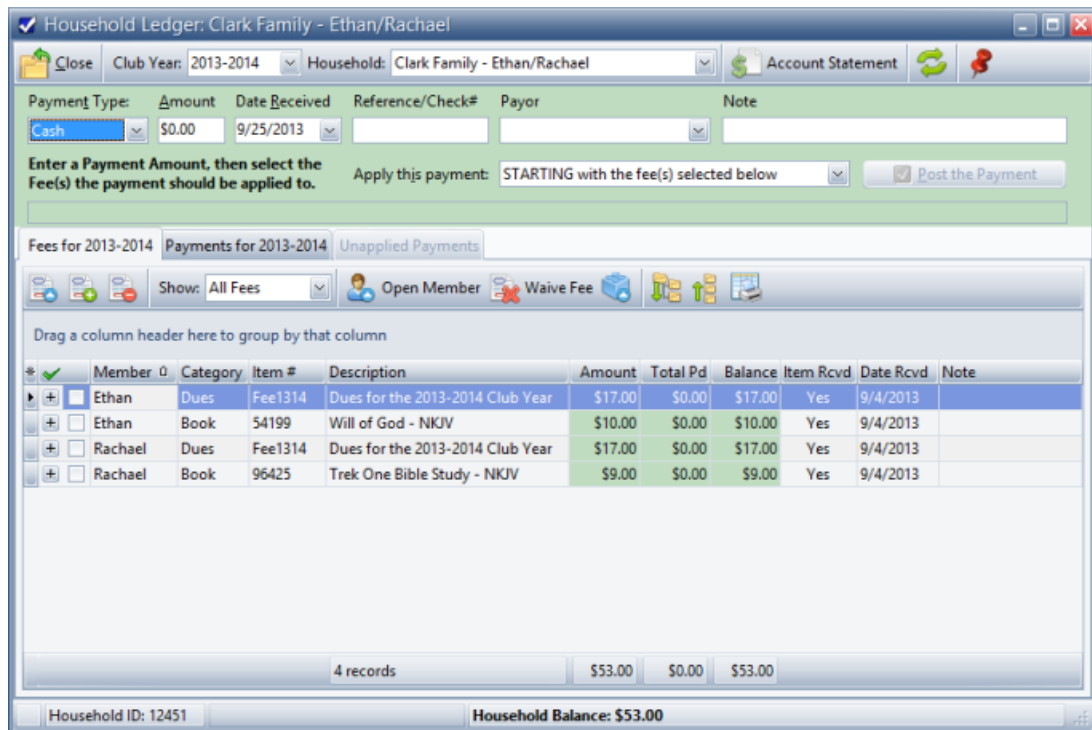
- In the grid, expand a fee's row to see all of the payments that have been applied to it.



Manipulate the grid as explained in [working with grids](#).

Payments

 When members bring money for items like dues, books, and uniforms, keep track of exactly 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. If a payment is posted that is not applied to a fee, it will be tracked as an "Unapplied" payment amount that can be applied later when fees are created. This is common at the beginning of a club year when registrations and payments might be accepted before fees are created.



| * ✓ | Member | Category | Item # | Description | Amount | Total Pd | Balance | Item Rcvd | Date Rcvd | Note |
|-----|---------|----------|---------|----------------------------------|---------|----------|---------|-----------|-----------|------|
| + | Ethan | Dues | Fee1314 | Dues for the 2013-2014 Club Year | \$17.00 | \$0.00 | \$17.00 | Yes | 9/4/2013 | |
| + | Ethan | Book | 54199 | Will of God - NKJV | \$10.00 | \$0.00 | \$10.00 | Yes | 9/4/2013 | |
| + | Rachael | Dues | Fee1314 | Dues for the 2013-2014 Club Year | \$17.00 | \$0.00 | \$17.00 | Yes | 9/4/2013 | |
| + | Rachael | Book | 96425 | Trek One Bible Study - NKJV | \$9.00 | \$0.00 | \$9.00 | Yes | 9/4/2013 | |

4 records \$53.00 \$0.00 \$53.00

Household ID: 12451 Household Balance: \$53.00


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



If a member cannot afford to pay for any item, or if your Awana Program routinely purchases items for clubbers, waive the 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 additional information that is useful in referencing the payment. For example, a Check #.
- **Payor** - person making the payment.
 -  Payors in each household will be 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** - AWdb will logically consider all unpaid fees and apply the payment to any non-dues fees first. It will continue applying a payment to each fee until the money is spent. If all fees are paid and there is money remaining, an Unapplied Payment will be created.
- **STARTING with the fee(s) selected below** - From 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), AWdb uses the same logic as above to cover the other fees.

| Member | Category | Item # | Description | Amount | Total Pd | Balance | Item Rcvd | Date Rcvd | Note |
|---|----------|---------|----------------------------------|---------|----------|---------|-----------|-----------|------|
| <input checked="" type="checkbox"/> Ethan | Dues | Fee1314 | Dues for the 2013-2014 Club Year | \$17.00 | \$0.00 | \$17.00 | Yes | 9/4/2013 | |
| <input type="checkbox"/> Ethan | Book | 54199 | Will of God - NKJV | \$10.00 | \$0.00 | \$10.00 | Yes | 9/4/2013 | |
| <input type="checkbox"/> Rachael | Dues | Fee1314 | Dues for the 2013-2014 Club Year | \$17.00 | \$0.00 | \$17.00 | Yes | 9/4/2013 | |
| <input type="checkbox"/> Rachael | Book | 96425 | Trek One Bible Study - NKJV | \$9.00 | \$0.00 | \$9.00 | Yes | 9/4/2013 | |

- **ONLY to the fee(s) selected below** - From the **Fees for [club year]** tab, explicitly select the fees to which the payment will be applied. If there is money remaining, an Unapplied Payment is created.
- **EVENLY distributed to the fees selected below** - From the **Fees for [club year]** tab, explicitly select the fees to which the payment will be distributed.








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

- **to NONE of the fees (just post the payment)** - The entire amount of the payment is used to create an Unapplied Payment.

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. If there is money remaining after paying the fee(s), an unapplied payment is added to the **Unapplied Payment** grid.

Payments Toolbar

| Icon | Action | Description |
|---|--|--|
|  | Save | Saves changes made to payment details. There is no Payment dialog. Payment details can be edited directly in the grid. The following fields are editable: Date Rcvd, [Payment] Type, Reference, Payor, Note  If one of those columns is not showing, learn how to show/hide columns . |
|  | 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. |

In the grid, expanding a payment's row shows all of the fees to which it was applied.

Unapplied Payments

The **Unapplied Payments** tab displays any payments (or portions of payments) that have not been applied to a specific fee. This could occur if a member pays more than the fee amount due in order to set the extra aside for future fees or when posting payments at the beginning of the club year before fees are created. The fee can then either be used as a payment or applied as a donation.

Household Ledger: Farmer - Mike, Kristen, Danny, Marjorie, Jonah

Close Club Year: 2018-2019 Household: Farmer - Mike, Kristen, Danny, Marjorie, Jon Account Statement

Payment Type: Amount Date Received Reference/Check# Payor Note
 Cash \$0.00 4/24/2019 Michael Farmer

Apply this payment: to ALL unpaid fees Post the Payment

Fees for 2018-2019 Payments for 2018-2019 Unapplied Payments

Use the payment amount Apply this amount as a donation Clear the pre-filled values from payment area above

| * Payment ID | Amount | Unapplied Amt | Date Rcvd | Type | Reference | Payor | Note |
|--------------|----------|---------------|-----------|----------|-----------|-----------------|-----------------|
| 4914 | \$27.50 | \$5.50 | 8/29/2018 | Discount | | A Sample Church | pastor discount |
| 4915 | \$100.00 | \$4.50 | 8/29/2018 | Check | | Michael Farmer | |

\$10.00 2 pymts

Household ID: 12637 Household Balance: \$0.00 \$10.00 is Unapplied


To use an unapplied payment for an existing fee:

1. Select the unapplied payment to use.
2. Click **Use the payment amount**. The top portion of the window is filled in with information from the payment. Continue as explained for [Posting a Payment](#). Once the **Post the Payment** button is clicked, the **Total Paid** and **Balance** are adjusted on the **Fees** grid, the Unapplied amount is adjusted on the **Payments** grid and the selected unapplied payment is removed from the **Unapplied Payments** grid.

 Click **Clear the pre-filled values from payment area above** to cancel the use of the payment amount if needed.

To apply an unapplied payment as a donation:


1. Select the unapplied payment to use.
2. Click **Apply this amount as a donation** and answer "Yes" in the confirmation dialog. A Fee record will be created with an Item Number of "Donation" for the unapplied amount. The payment will then be applied to the new "Donation" fee.


 This is an easy way to handle an unapplied amount when a parent overpays and says to keep the additional amount.

Chapter

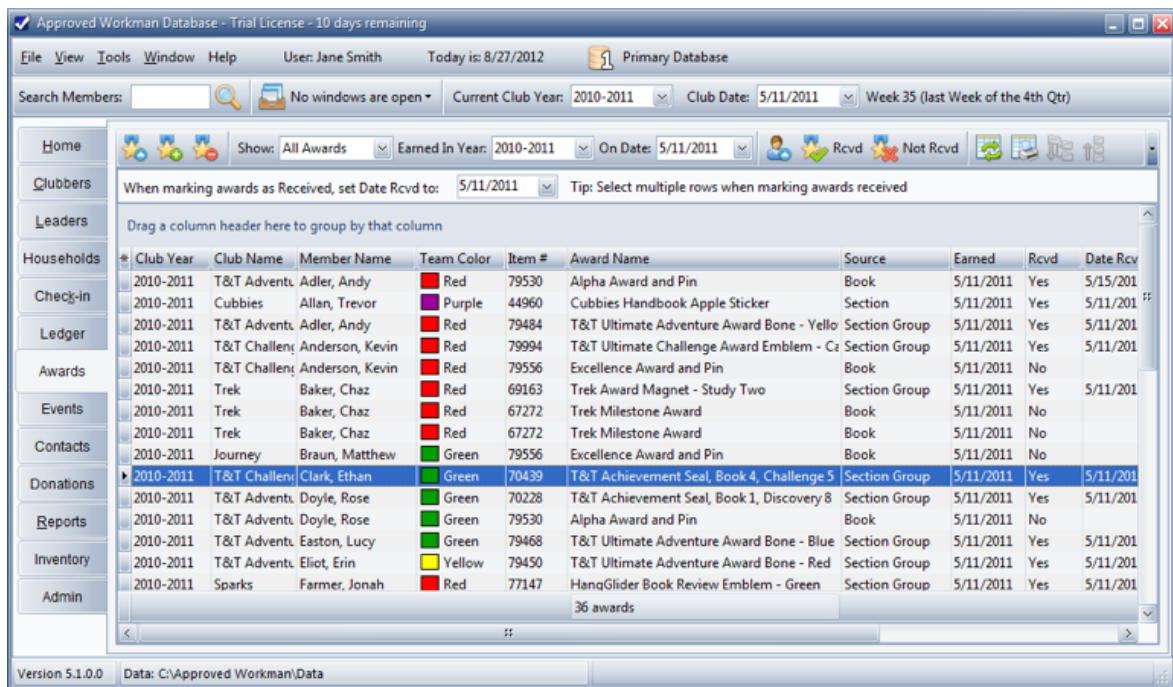
13




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 Directors or Commander to use when presenting awards.



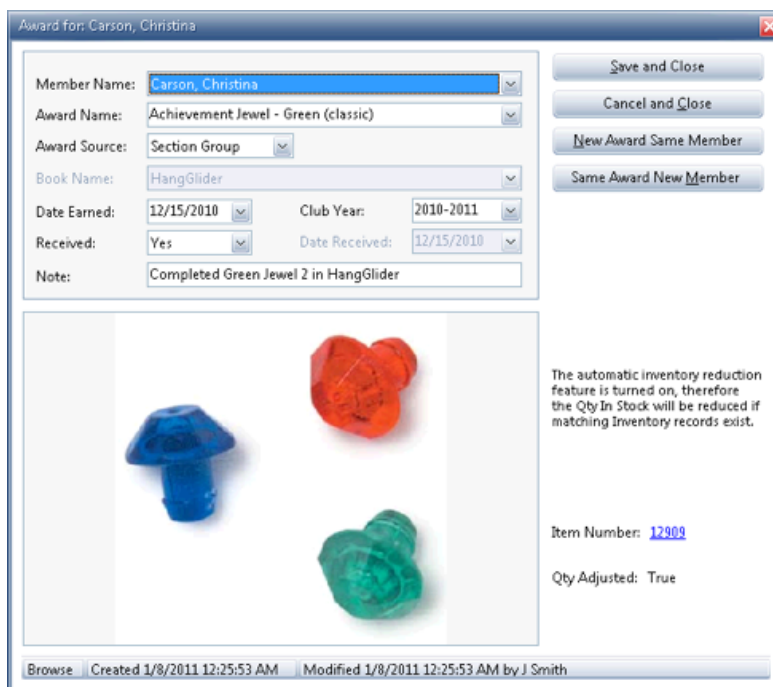
| Icon | Action | Description |
|---|---------------------------------|---|
|  | Open Award | Opens the selected award in the Award dialog . (Pressing the Enter key with a row selected or double clicking the row also opens the award.) |
|  | New Award (Ctrl-N) | Opens the Award dialog with blank/default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

| | | |
|---|--------------------|--|
| | 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. |
|  | Open Member | Opens the member record for the person who earned the selected award. |
|  | 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 <i>not</i> 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 the 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 clubs. Trek and Journey clubs usually only 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.



Award for: Carson, Christina

Member Name: Carson, Christina

Award Name: Achievement Jewel - Green (classic)

Award Source: Section Group

Book Name: HangGlider

Date Earned: 12/15/2010 Club Year: 2010-2011

Received: Yes Date Received: 12/15/2010


Note: Completed Green Jewel 2 in HangGlider

The automatic inventory reduction feature is turned on, therefore the Qty In Stock will be reduced if matching Inventory records exist.




Item Number: [12909](#)

Qty Adjusted: True

Browse | Created 1/8/2011 12:25:53 AM | Modified 1/8/2011 12:25:53 AM by J Smith

- **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

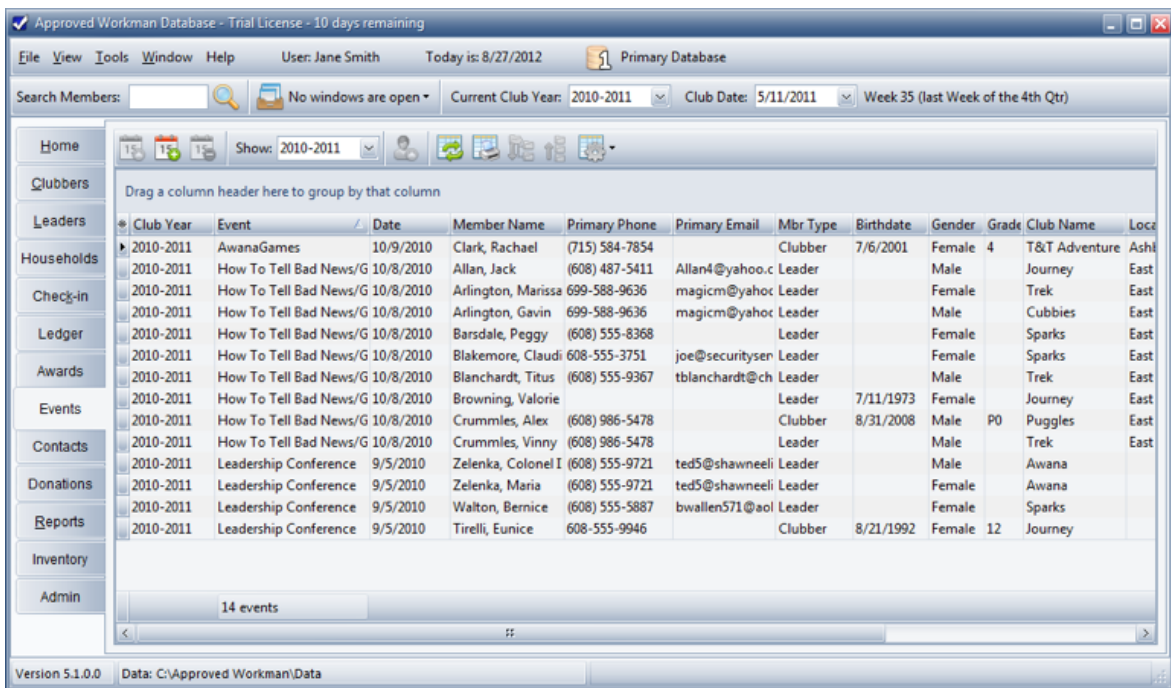
- **Save and Close** - saves the record and closes the dialog.
 -  If additional awards need to be created, instead of clicking **Save and Close**, use either **New Award Same Member** or **Same Award New Member**, as mentioned below.
 - **Cancel and Close** - exits without creating a new record or saving 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.
-  The award item's **Qty in Stock** is reduced when the award is saved if the [automatic inventory reduction feature](#) is turned on and a matching Inventory record exists.






Chapter

14

14 The Events Module

 The Events Module provides a way to track the events members have participated in. Add, delete, view or modify records. Some popular events are provided by default. Customize additional event names under [Admin > Generic Lookups > Events](#) and associate awards with those 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). |
| | Show | Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed. |
|  | Open Member | Opens the member record for the person who participated in the selected event. |
|  | Grid Tools | Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data. |

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](#).



Awards associated with the event are shown in the lower section of the dialog.

- **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 events, use the [Awards Module](#) to add an event award or edit details of the event award.

Action Buttons

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




If additional events need to be created, instead of clicking **Save and Close**, use either **New Event Same Member** or **Same Event New Member** as mentioned below.

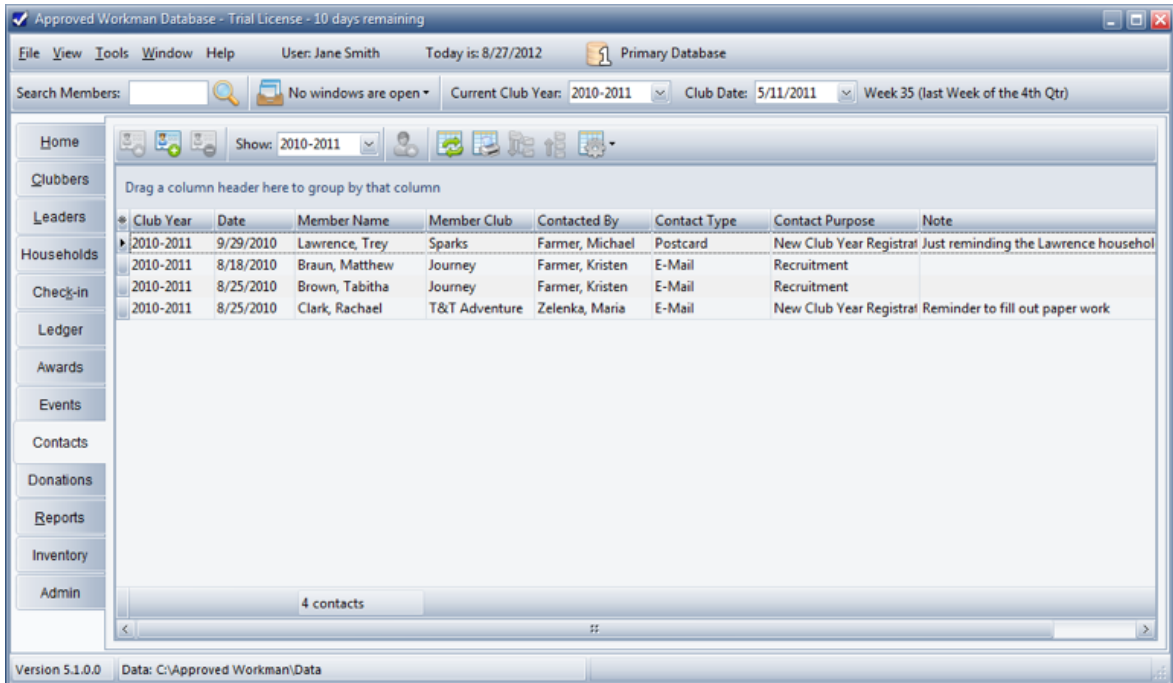
-
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
 - **New Event Same Member** - saves the event then selects the same **Member Name** and shows any previous event awards earned by the member to begin entering another event.
 - **Same Event New Member**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






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). |
| | Show | Filters the data in the grid based on Club Year. Defaults to the current club year but can be changed. |
|  | Open Member | Opens the member record for the person who was contacted in the selected record. |
|  | Grid Tools | Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data. |


15.1 The Contact Dialog



Opening or creating a new 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.
 -  If additional contacts need to be created, instead of clicking **Save and Close**, use either **New Contact Same Member** or **Same Contact New Member** as mentioned below.
- **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.

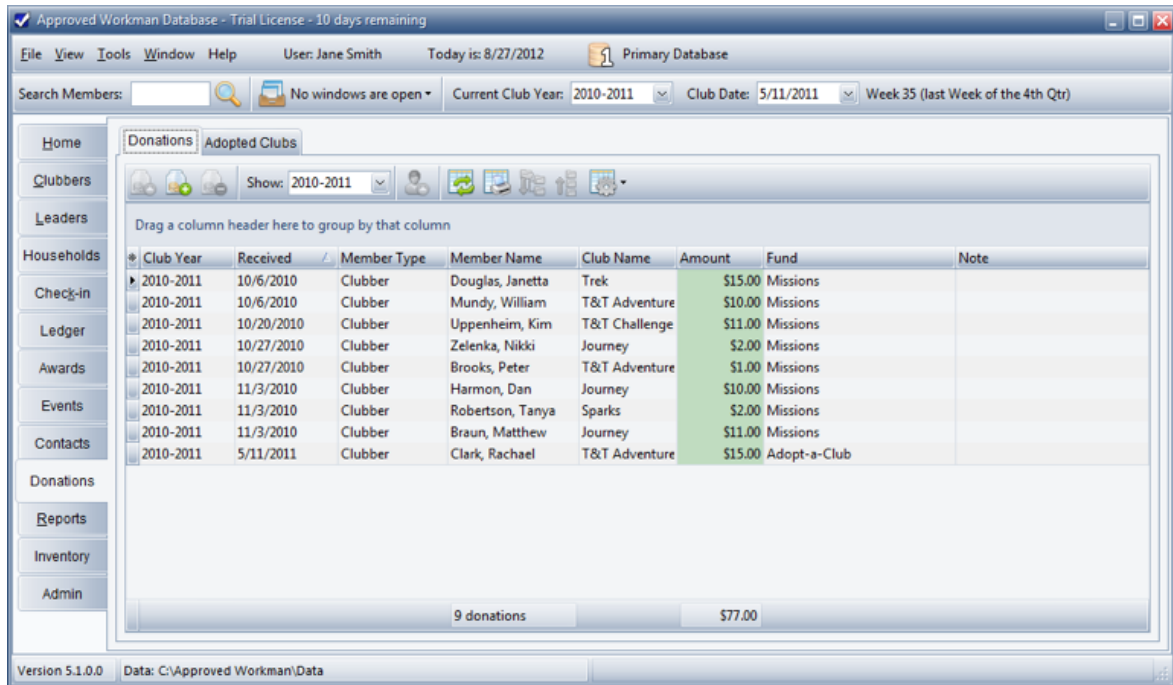
Chapter

16

16 The Donations Module



The Donations Module provides a way to track donations to your club, adopted clubs, or other funds as well as associated awards. Customize the funds under [Admin > Generic Lookups > Donation Purpose/Funds](#).



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

16.1 The Donation Dialog



Opening or creating a new donation opens the Donation dialog to view, modify or enter details of a donation.

When the [Check-in Module's Offering](#) field is used to track an amount given by a member, a Donation record is created for the member and fund. When a Donation record is opened that was automatically created, a message will be displayed (as shown in the screen capture below).



Set the Fund to be used for a particular club date under [Admin > Club Setup > Club Calendars](#).

Donation from: Alen, Dorothy

Member Name: Alen, Dorothy

Total Amount*: \$1.00

Last Received*: 9/4/2013 Club Year: 2013-2014

Purpose/Fund: Missions

Note:

Awards earned for this Donation

Award Name:

Award Received: No Date Received:

To help you determine the appropriate award (if applicable) for a NEW donation, below is a list of Awards already earned by this member for previous donations:

| Date | Award Name |
|----------------------|------------|
| <No data to display> | |

<-- Award related components are enabled only when entering NEW records. To edit award info, use the Award dialog.

* This record was created by the system to track offering amounts entered on the Check-in screen, therefore only the Note and Award fields are editable.

Tip: You can double-click any Award record shown in the grid to open it.

Tip: You can customize the Purpose/Fund choices under Admin > Generic Lookups.

Browse Created 11/19/2014 9:04:56 AM Modified 11/19/2014 9:04:56 AM by Jane

- **Member Name** - person who made the donation.
- **Amount** - the total money donated.
- **Received** - 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.
- **Purpose/Fund** - selection options are determined by [Admin > Generic Lookups > Donation Purpose/Funds](#).
- **Note** - any additional information to track for the donation.

Awards

When creating a new donation, an award can be assigned to the member as follows:



This feature is especially useful for participation in Adopt-a-Club.



For existing donations, use the [Awards Module](#) to add a donation award or edit details of the donation award.

- **Awards earned for this Donation** - select the award from the drop-down list. Awards previously earned are shown at the bottom of the dialog to aid award selection.



If the correct award is not available in the drop-down list, open the desired award item in the [Inventory Module](#) and click on the **Club Usage** tab. Select **This item is a donation-related Award** under **Use this item as a choice in any AWARD** related drop-down list.

- **Award Received** - when Yes, enter the **Date Received**.

Actions





- **Save and Close** - saves the record and closes the dialog.
 - If additional donations need to be created, instead of clicking **Save and Close**, use either **New Donation Same Member** or **Same Donation New Member** as mentioned below.
- **Cancel and Close** - exits without creating a new record or saving changes to an existing one.
- **New Donation Same Member** - saves the donation then selects the same **Member Name** to begin entering another donation.
- **Same Donation New Member** - saves the donation and leaves all of the donation information the same, except for the **Member Name**, which is left blank. Select the **Member Name** and edit any of the fields as needed.

16.2 Adopted Clubs



The **Adopted Clubs** page of the Donation Module maintains the list of clubs supported by your Awana Program.

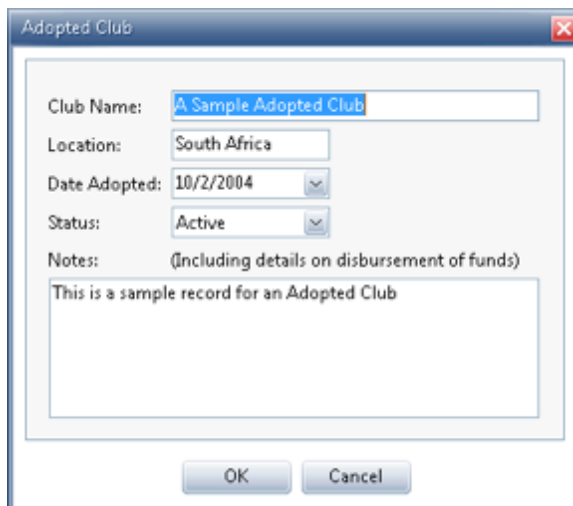
| Adopted Club Name | Location | Date Adopted | Status | Notes (including details on disbursement of funds) |
|-----------------------|--------------|--------------|--------|--|
| A Sample Adopted Club | South Africa | 10/2/2004 | Active | This is a sample record for an Adopted Club |
| A Second Adopted Club | Zimbabwe | 11/17/2004 | Active | Another sample record, the 2nd club entered |

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|-------------------------------------|---|
|  | Open Adopted Club | Opens the selected club in the Adopted Club dialog . (Pressing the Enter key with a row selected or double clicking the row also opens the club record.) |
|  | New Adopted Club (Ctrl-N) | Opens the Adopted Club dialog with blank/default values to create a new Adopted Club. |
|  | Delete Adopted Club (Ctrl-D) | Removes the selected adopted club. |
|  | Grid Tools | Lists actions related to the grid such as: saving or resetting a grid layout, or exporting data. |

16.2.1 The Adopted Club Dialog



Opening or creating a new adopted club record opens the Adopted Club dialog. This is a simple dialog for collecting the information about a club that your Awana Program has adopted. Once the data is filled in, click **OK** to save the Adopted Club, or **Cancel** to close without saving the changes.



The screenshot shows a dialog box titled "Adopted Club" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Club Name: A text box containing "A Sample Adopted Club" with the text selected.
- Location: A text box containing "South Africa".
- Date Adopted: A date picker showing "10/2/2004".
- Status: A dropdown menu showing "Active".
- Notes: A text area with the placeholder text "(Including details on disbursement of funds)" and the content "This is a sample record for an Adopted Club".
- Buttons: "OK" and "Cancel" buttons at the bottom.

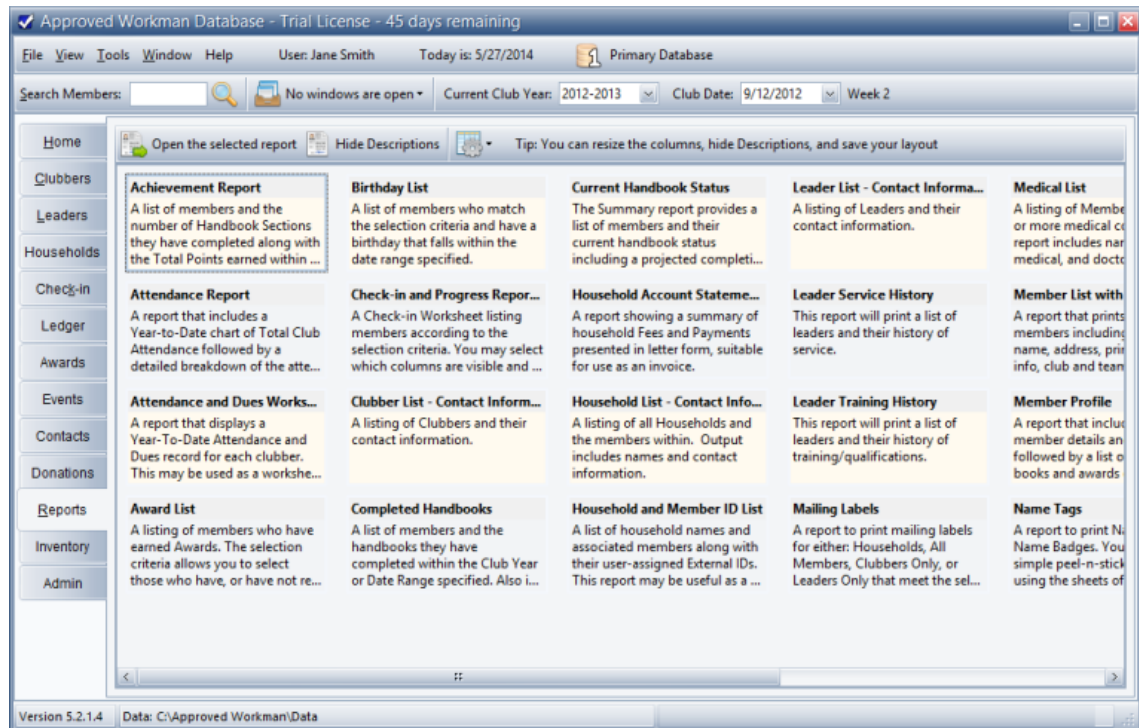
Chapter


17

17 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 data set is generated.



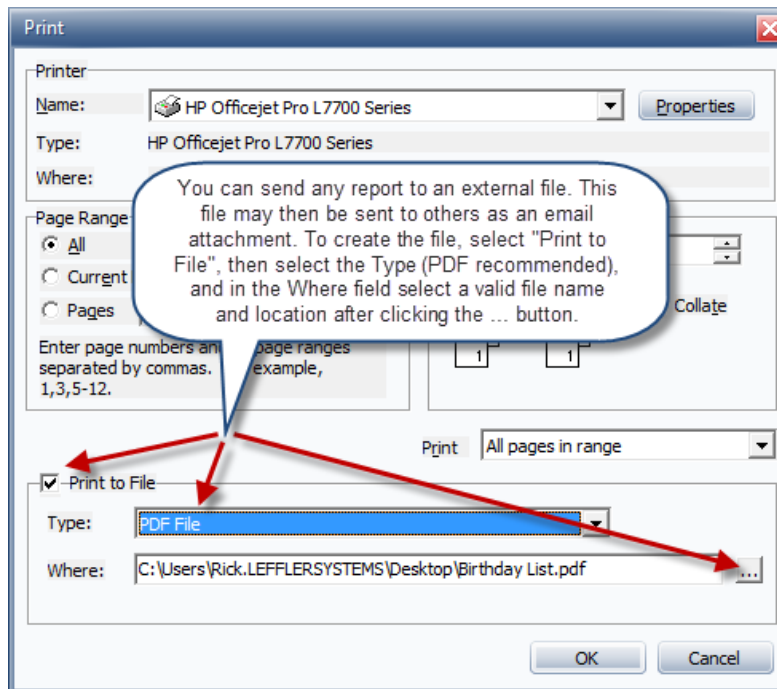
The **Preview** and **Print** buttons are disabled until necessary options are chosen.

7. Click **Print** - opens a typical Print dialog.

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



Any report output can be sent to an external file suitable for e-mailing.



17.1 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.
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.

Report Dialog

Report: Achievement Report

Description: A list of members and the number of handbook sections they have completed along with the total points earned within the date range specified.

Report Type

- 1. Individual members are listed for each club date within the range specified.
- 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.

Selection Criteria

Club Name: (All Clubs) [v]

Team Name: (All Teams) [v]

Member Type: Clubber [v]

Member Status: Active,Visitor [v]

Member Code: [] (blank = all codes)

Club Dates From: 4/23/2014 [v]
To: 4/23/2014 [v]

Group By

- Date, Club Name
- Date, Club Name, Grade
- Date, Club Name, Team Color
- Date, Club Name, Grade, Team Color
- Date, Club Name, Team Name

Sort By

- First Name
- Last Name
- Sections Completed (high to low)
- Points Earned (high to low)

Options

Apply shading to alternating rows using this color: PaleTurquoise [v]

Print Preview Close

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 | Points | Extra Cr Sections Completed | 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 |
| | | Elliot, 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 | | (All Teams) | | 4917 Example Street Madison, WI 53714 | | | | |
| Summary | | | | | | | | |
| Member | Required Sections Completed | Points | Extra Cr Sections Completed | Points | Total Sections | Total Points | | |
| Allen, Dorothy | 6 | 60 | 0 | 0 | 6 | 60 | | |
| Allen, 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 | | |
| Brackenhelmer, Kevin | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Bunker, Samantha | 0 | 0 | 0 | 0 | 0 | 0 | | |
| Carson, Ben | 0 | 0 | 0 | 0 | 0 | 20 | | |
| Clark, ... | 0 | 0 | 0 | 0 | 0 | 0 | | |

Report Type # 3

| Achievement Report: 9/4/2013 | | (All Clubs) | | ASC Awana Club | | | | |
|------------------------------|----------------------------------|-------------|-----------------------------|--|----------------|--------------|------------|--|
| Active Visitor Clubbers | | (All Teams) | | 4917 Example Street Madison, WI 53714 | | | | |
| Summary | | | | | | | | |
| Date | Required Sections Completed | Points | Extra Cr Sections Completed | 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 Summary Totals: | 26 | 260 | 0 | 0 | 26 | 460 | |

17.2 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

Report: Attendance Report

Description: A report that includes a Year-to-Date Chart of Total Club Attendance followed by a detailed breakdown of the attendance counts for each individual club for each week.

Selection Criteria

Club Year: 2013-2014

Club Name: (All Clubs)

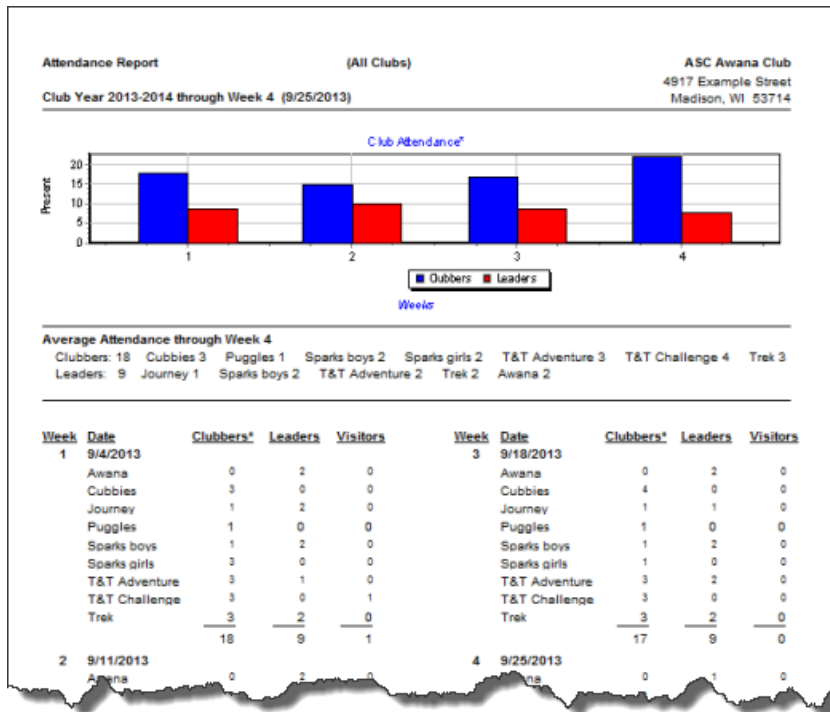
Note: The Current Club Date selected in the main toolbar affects the number of weeks displayed and the averages are calculated based only on those weeks.

Chart

Style: Bar Chart 2D 3D Show values

Legend Position: Bottom

Example Output



17.4 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 Clubs) | ASC Awana Club | | | |
|--|--------------|--------------------------------|--|---------------|--|--|
| (All Statuses) Clubbers | | (All Teams) | 4917 Example Street | | | |
| Awards earned from 9/4/2013 to 9/25/2013 | | Grouped by: Club Name | 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 Emblem | Completed HoneyComb Trail in HoneyComb Hand |
| | Cubbies | 9/18/2013 | No | | HoneyComb Trail Emblem | Completed HoneyComb Trail in HoneyComb Hand |
| 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 - Green | Completed Rank Section in HangGlider |

17.5 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

Report: Birthday List

Description: A list of members who match the selection criteria and have a birthday that falls within the date range specified.

Selection Criteria

Club Name: (All Clubs)

Team Name: (All Teams)

Member Type: Clubbers and Leaders

Member Status: (All Statuses)

Member Code: (blank = all codes)

Date Range . . . From: 10/1/2013

To: 10/31/2013

Note: The date years are ignored!

Sort By

Birthday (month and day)

Club, Birthday

Club, Team, Birthday

Age

Show age only for clubbers

Show age for all members

Do not show any ages

Options

Apply shading to alternating rows using this color: PaleTurquoise

Print Preview Close

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 Oppenheim | T&T Adventure | Female | 9/22/2005 Monday | just turned 9 | 858 Ratherstraight Rd Madison, WI 53704 |
| Janetta Douglas | Journey | Female | 10/15/1997 Wednesday | just turned 11 | 1542 Washington Ave. Madison, WI 53704 |
| Emily Leffler | Puopoles | 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 11 | 800 Coolidge Dr Sun Prairie, WI 53527 |
| Nat Skiowith | | Male | 10/31/1990 Friday | just turned 21 | Madison, WI 53714 |
| Annette Jones | Awana | Female | 10/31 Friday | | 9 Millio Court Madison, WI 53714 |

17.6 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

Report: Check-in and Progress Report Worksheet

Description: A worksheet for recording attendance details and completed sections.

Selection Criteria

Club Date: 10/2/2013
 Club Name: Cubbies
 Team Name: (All Teams)
 Member Type: Clubber
 Member Status: Active,Visitor
 Member Code: (blank = all codes)
 Include visitors only if they have attended our club since: 9/11/2013

Group By

<none>
 Club Name
 Club Name, Grade
 Club Name, Team Color
 Club Name, Team Name
 Club Name, Leader Name

Sort By

First Name
 Last Name

Info to display to the right of the Check-in Categories

Current book & last section completed and blank lines to record new sections
 Other - use a column heading of: SIGN IN

Options

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

I'm using a color printer, so print the Team Color text inside a block of the Team's color
 Shade alternate rows with: PaleTurquoise
 Orientation: Landscape

Select Visible Columns... Print Preview Close

Example Output

| Check-in & Progress Report | | Cubbies - A Wing | | | | ASC Awana Club | | |
|-------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|----------------------------|
| Club Date: 10/2/2013 Week # 5 | | | | | | 4917 Example Street | | |
| Theme/Event: | | Grade P2 | | | | Madison, WI 53714 | | |
| Clubber Name | Attend | Attend | In | Has | Has | Earned | Current Book & Last Req Section Done | Sections Done Today |
| Club | Church | Dues | Uniform | Bible | Book | Bonus | | |
| Bridgette Robertson ~ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | AppleSeed Handbook Bear Hug 3 | _____ |
| Caleb Elliot ~ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | HoneyComb Handbook AppleSeed Handbook Bear Hug 2 skipped: Unit 1.1. | _____ |
| Charity Arlington ~ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | AppleSeed Handbook Bear Hug 2 | _____ |
| Sara Selden ~ | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | 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:

17.7 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

Report: Clubber List - Contact Information

Description: A list of clubbers and their detailed contact information. This report may also be useful for contacting visitors from a specific club date while their Status is still "Visitor".

Selection Criteria

Club Name:

Team Name:

Member Status:

Member Code: (blank = all codes)

Visitor follow-up

Select only those clubbers who visited on:

Club Date:

Group By

<none>

Grade

Team Color

Team Name

Leader Name

Sort By

First Name

Last Name


Print Preview Close

Example Output

| Clubber List - Contact Information | | -- CONFIDENTIAL -- | | ASC Awana Club 4917 Example Street Madison, WI 53714 | |
|--|--|---|--|--|--|
| T&T Challenge - Grade 5 | | | | | |
| (All Statuses) Clubbers | | | | | |
| 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 (325) 987-4510 E-mail joe@securityservices.com E-mail claudiab@gmail.com Home Phone 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 608-555-3572 Home Phone 608-555-1853 | |
| Mr. Mundy Mr. and Mrs. Mundy | | | | | |

17.8 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 | | (All Clubs) | ASC Awana Club 4917 Example Street Madison, WI 53714 | | | |
|-----------------------------------|-------------------------|----------------|--|-----------|-----------------------------------|--|
| Completed in Club Year: 2011-2012 | | (All Teams) | | | | |
| Clubbers | | | | | | |
| Club and Member Name | Handbook Name | Date Completed | Award Rcvd | Date Rcvd | Award Name | |
| Cubbies | | | | | | |
| James Uppenheim | Jumper Celebrations | 4/25/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Cubbies Year Two Book Award | |
| Jaqueline Allan | Jumper Celebrations | 4/25/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Cubbies Year One Book Award | |
| Nora Sabello | Jumper Celebrations | 4/18/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Cubbies Year Two Book Award | |
| | | | <input checked="" type="checkbox"/> | 4/25/2012 | Jumper VIP Diploma | |
| Journey | | | | | | |
| Dan Harmon | Galatians and Ephesians | 4/25/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Meritorious Award and Pin | |
| Janetta Douglas | Galatians and Ephesians | 4/25/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Timothy Award and Pin | |
| Margo Baker | Galatians and Ephesians | 2/22/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Timothy Award and Pin | |
| Nikki Zelenka | Galatians and Ephesians | 4/4/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Journey Certificate of Award | |
| Stephie Kaedle | Galatians and Ephesians | 4/18/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Journey Certificate of Award | |
| Sparks boys | | | | | | |
| Jared Uppenheim | SkyStormer | 2/22/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Sparky Award Plaque and Award Pin | |
| Jared Uppenheim | SkyStormer | 4/18/2012 | <input checked="" type="checkbox"/> | 4/25/2012 | Sparky Award Plaque and Award Pin | |

17.9 Current Handbook Status

This report provides a way to evaluate progress in currently assigned handbooks. There are three types:

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.



If there is an entrance booklet and main handbook both marked as "current", with the option to "Include Entrance Booklets" checked, sections for both will print on the same page.

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

Report: Current Handbook Status

Description: The Summary report provides a list of members and their current handbook status including a projected completion date and the corresponding book award(s) to help you plan your next supply order. The Detail report type may be used as a worksheet for tracking completed sections.

Report Type

Summary ... No individual sections are listed. Statistics are shown for each "current" and/or completed book within the current club year. Each page displays information for up to 15 members.

Detail ... Lists all sections in the member's current book along with the date completed. A separate page is printed for each member.

Quick View ... Lists each member's club, team name and current book followed by a bar graph representing progress in completing the required sections.

Selection Criteria

Member Type: Clubber

All members that match the following conditions:

Club Name: Sparks boys, Sparks girls

Team Name: (All Teams)

Member Status: (All Statuses)

Member Code: (blank = all codes)

A book must be at least 0 % completed to be listed

Only those members selected below:

None selected

Include Entrance Booklets (e.g. Flight 3:16 and Start Zone)

Sort By

First Name

Last Name

Club Name, Last Name

Club Name, Team Color

Club Name, Team Name

Club Name, Leader Name

Options

Quick View Graph Color: Navy

Shade alternate rows with: PaleTurquoise

Note: This report is complex and may take several seconds to run.

Print Preview Close

Example Output

Report Type: Summary

| Current Handbook Status as of 11/20/2014 | | Sparks boys, Sparks girls | | | | ASC Awana Club 4917 Example Street Madison, WI 53714 | | | | | |
|---|-------|--|----------|-------------|-------------|--|-----------------|------------|-------------------------------------|----------------------|--|
| (All Statuses) Clubbers who have completed at least 0% of the required sections in their current handbook | | Sorted by Club Name, Last Name (All Teams) | | | | | | | | | |
| Member Info | Gr | Registered/Attend Last/Attend | Ratio | Club Name | Book | - Required Sections - Done | Avg/wk* Needs** | % Complete | On Sched | Estimated Completion | Award(s) Due Upon Completion |
| Allan, Trevor | 2 | 8/28/2013 | 10/12 | Sparks boys | WingRunner | 15 of 40 | 1.7 | 1.1 | <input checked="" type="checkbox"/> | 3/5/2014 | Sparks Second Book Award Ribbon |
| Male | Age 8 | 11/13/2013 | Active | Cowboys | | | | | | | |
| Brackenhimer, Kevin | 2 | 9/4/2013 | 7/12 | Sparks boys | SkyStormer | 10 of 40 | 1.1 | 1.4 | <input type="checkbox"/> | 5/28/2014 | Sparky Award Plaque and Pin |
| Male | Age 8 | 11/6/2013 | Active | | | | | | | | |
| Green, Alonzo | 1 | 3/12 | 3/12 | Sparks boys | Flight 3:16 | 6 of 6 | 0.5 | 0 | <input checked="" type="checkbox"/> | 9/11/2013 | Now eligible for Sparks uniform and book |
| Male | Age 7 | 9/25/2013 | Inactive | | HangGlider | 8 of 40 | 0.8 | 1.5 | <input type="checkbox"/> | 8/27/2014 | Sparks First Book Award Ribbon |
| Loomis, D | 1 | 10/19/2013 | 10/12 | Sparks boys | WingRunner | 17 of 40 | 1.7 | 1.1 | <input checked="" type="checkbox"/> | 3/12/2014 | Sparks Second Book Award Ribbon |

Report Type: Detail

| Uppenheim, James | | Current Handbook Status as of 11/20/2014 | | | | ASC Awana Club 4917 Example Street Madison, WI 53714 | | |
|---|--|---|-----------------|-----------------|-------------------------------------|--|---------------------------------|--|
| Male age:7 Grade:1 Sparks boys Team Color - Green | | Registered: 8/28/2013 Attendance Ratio: 9/12 Status: Active | | | | | | |
| WingRunner | Item | - Required Sections - Done | Avg/wk* Needs** | % Complete | On Schedule | Estimated Completion | Award(s) Due Upon Completion | |
| WingRunner | Item 77981 WingRunner Handbook with Audio CD - NKJ | 16 of 40 | 1.5 | 1.1 | <input checked="" type="checkbox"/> | 3/12/2014 | Sparks Second Book Award Ribbon | |
| Required Sections | | | | | | | | |
| Completed | Completed | Completed | 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 | 10/6/2013 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 | 10/20/2013 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 | | |
| 9/28/2013 Rank Section 7 | 11/13/2013 Green Jewel 1:4 | | | Red Jewel 3:1 | | Red Jewel 4:2 | | |
| 10/28/2013 Rank Section 8 | Red Jewel 2:1 | | | Green Jewel 3:2 | | Green 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 4917 Milwaukee Street Madison, WI 53714 | |
|---|--------------|---|--|--|--|
| Active Clubbers who have completed at least 0% of the required sections | | Club Date 2/13/2019 Week 25 | | | |
| Club and Member | Current Book | % Complete and Progress made in the Required Sections | | | |
| Sparks Boys | | | | | |
| Allen, Jeff | HoneyComb | 15 | <div style="width: 100%; height: 10px; background-color: blue;"></div> | | |
| Sparks Girls | | | | | |
| Leffler, Emily | HangGlider | 7 | <div style="width: 50%; height: 10px; background-color: blue;"></div> | | |
| Lewis, Anna | HangGlider | 15 | <div style="width: 100%; height: 10px; background-color: blue;"></div> | | |
| T&T Adv | | | | | |

17.10 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

Report: Household Account Statements

Description: A report showing a summary of household Fees and Payments presented in a letter format, suitable for use as an invoice.

Note: You may customize the opening paragraph text under Admin > Options > Fees and Dues > Account Statement.

Selection Criteria

The Household of:

All Households with a Status of

Only the Households selected below: (this is a list of Active households)

Select Fees from the Current Club Year only

Exclude Fees that are related to Dues

Do not print statements for households with a zero balance

Include a section listing each household member's name and club

Include Inactive Members (Graduated, Archived and Prospective Members are always automatically excluded)

Options

I am using a window envelope so start the Name and Address block at:


Top: Left:

Example Output

| Household Account Statement | A Sample Church ASC Awana Club 4917 Example Street Madison, WI 53714 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|-------------------|--------------------|----------|--------------------|------|---------|----------------------------------|----------|---------|--------|---------|--|------|----------------------------------|----------|---------|---------|--------|--|---------|-----------------------------|----------|--------|--------|--------|--|------|-----------------------------|----------|--------|--------|--------|--|--|--|--|---------|---------|---------|--|
| <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> Maretti Family 31210 Langstrom Lane Madison, WI 53713 </td> <td style="width: 50%; vertical-align: top;"> Household Members <hr/> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Miss Anna Maretti</td> <td style="width: 20%;">Trek</td> <td style="width: 20%;">Clubber</td> </tr> <tr> <td>Mr Michael Maretti</td> <td>Trek</td> <td>Clubber</td> </tr> </table> </td> </tr> </table> | | Maretti Family 31210 Langstrom Lane Madison, WI 53713 | Household Members <hr/> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Miss Anna Maretti</td> <td style="width: 20%;">Trek</td> <td style="width: 20%;">Clubber</td> </tr> <tr> <td>Mr Michael Maretti</td> <td>Trek</td> <td>Clubber</td> </tr> </table> | Miss Anna Maretti | Trek | Clubber | Mr Michael Maretti | Trek | Clubber | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Maretti Family 31210 Langstrom Lane Madison, WI 53713 | Household Members <hr/> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Miss Anna Maretti</td> <td style="width: 20%;">Trek</td> <td style="width: 20%;">Clubber</td> </tr> <tr> <td>Mr Michael Maretti</td> <td>Trek</td> <td>Clubber</td> </tr> </table> | Miss Anna Maretti | Trek | Clubber | Mr Michael Maretti | Trek | Clubber | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Miss Anna Maretti | Trek | Clubber | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Mr Michael Maretti | Trek | Clubber | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <p>Dear Awana Club Family:</p> <p>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.</p> <p>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.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Member</th> <th style="text-align: left;">Description</th> <th style="text-align: left;">Item Rcvd</th> <th style="text-align: right;">Amount</th> <th style="text-align: right;">Total Pd</th> <th style="text-align: right;">Balance</th> <th style="text-align: left;">Note</th> </tr> </thead> <tbody> <tr> <td>Michael</td> <td>Dues for the 2013-2014 Club Year</td> <td>9/4/2013</td> <td style="text-align: right;">\$17.00</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$17.00</td> <td></td> </tr> <tr> <td>Anna</td> <td>Dues for the 2013-2014 Club Year</td> <td>9/4/2013</td> <td style="text-align: right;">\$17.00</td> <td style="text-align: right;">\$17.00</td> <td style="text-align: right;">\$0.00</td> <td></td> </tr> <tr> <td>Michael</td> <td>Trek One Bible Study - NKJV</td> <td>9/4/2013</td> <td style="text-align: right;">\$9.00</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$9.00</td> <td></td> </tr> <tr> <td>Anna</td> <td>Trek One Bible Study - NKJV</td> <td>9/4/2013</td> <td style="text-align: right;">\$9.00</td> <td style="text-align: right;">\$0.00</td> <td style="text-align: right;">\$9.00</td> <td></td> </tr> <tr> <td colspan="3"></td> <td style="text-align: right; border-top: 1px solid black;">\$52.00</td> <td style="text-align: right; border-top: 1px solid black;">\$17.00</td> <td style="text-align: right; border-top: 1px solid black;">\$35.00</td> <td></td> </tr> </tbody> </table> | | 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 | |
| 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 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

17.11 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

Report: Household List - Contact Information

Description: A listing of all Households and the members within. Output includes names and contact information. The external IDs are optional.

Selection Criteria

Household Status: **Active**

Family Church: (All Churches)

Include the External Household and Person IDs

Birthdates and Ages

Show only for clubbers

Show for all members

Do not show for anyone

Print Preview Close

Example Output

| Household List - Contact Information | | -- CONFIDENTIAL -- | | ASC Awana Club 4917 Example Street Madison, WI 53714 | |
|---|--------|------------------------|-------------------|--|----------------------|
| Status = 'Active' | | | | | |
| Household Name and Address | | | Contact Info | | |
| Allen - David, Mikayla, Dorothy | | | | | |
| Mr and Mrs Allen | | | | | |
| Madison, WI 53714 | | | | | |
| Family Church: East Madison Baptist church | | | | | |
| Allen, David | Male | | Inactive | Leader | |
| Allen, Mikayla | Female | dob: 5/3/2006 Age: 8 | Grade: 2 | Active | Sparks girls Clubber |
| Allen, 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 Church: East Madison Baptist Church | | | | | |
| Allan, Jack | Male | | Active | Leader | |
| Allan, Janice | Female | | Active | Leader | |
| Allan, Jaqueline | Female | dob: 11/23/2007 Age: 8 | Grade: K | Active | Sparks girls Clubber |
| Allan, Trevor | Male | dob: 3/19/2008 Age: 8 | Grade: 2 | Active | Sparks boys Clubber |
| Arlington - Gavin, Marissa, Charity, Douglas | | | | | |
| Arlington - Gavin, Marissa, Charity, Douglas | | Cell Phone | 699-588-5511 | Gavin | |
| Gavin and Marissa Arlington | | E-mail | magiom@yahoo.com | Marissa | |
| 358 Semester Drive | | E-mail | gavnarl@yahoo.com | Gavin | |
| Madison, WI 53714 | | Home Phone | 699-588-9638 | Marissa & Gavin | |
| Family Church: East Madison Baptist Church | | | | | |
| Arlington, Gavin | Male | | Archived | Leader | |
| Arlington, Marissa | Female | | Active | Leader | |

17.12 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

Report: Household and Member ID List

Description: A report that displays each Household Name and user-assigned External ID. Also included is a list of associated members and their External IDs. This report is useful if you have a formal check-in/check-out policy and are using this as a sign-out sheet.

Selection Criteria

Club Name: (All Clubs) [v]
 Team Name: (All Teams) [v]
 Member Type: Clubber [v]
 Member Status: (All Statuses) [v]
 Member Code: [] (blank = all codes)
 Include only those members who were present on: 4/24/2019 [v]
 Tip: After all clubbers have checked in and club night is well underway, print this report to include only those present and use it as a sign-out sheet when clubbers are picked up.

Group By *

<none>
 Club Name
 Club Name, Team Name
 Club Name, Team Color

* If grouping is applied, a new page will be started for each group.

Info to display to the right of the Member names

Heading: Sign-out Signature and Time [v]
 A blank underscored line suitable for a signature
 An empty checkbox (perhaps to indicate a clubber was picked up)
 Nothing (and don't print the heading either)

Options

Shade alternate rows with: PaleTurquoise [v]

Print Preview Close

Example Output

| Household and Member ID List | | -- CONFIDENTIAL -- | | ASC Awana Club | |
|---|--|---------------------------------|-----------------------------|---------------------|--|
| (All Statuses) Clubbers who were present on 9/25/2013 | | | | 4917 Example Street | |
| (All Clubs) | | | | 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, Jaquell Mr and Mrs Allan | Jaqueline Allan Trevor Allan | Sparks girls Sparks boys | _____ _____ | |
| | Arlington - Gavin, Marissa, Charity, I Gavin and Marissa Arlington Jennifer Nichols (aunt) | Douglas Arlington | Cubbies | _____ | |

17.13 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 | | -- CONFIDENTIAL -- | | ASC Awana Club 4917 Example Street Madison, WI 53714 | |
|--------------------------------------|---------------|---|--------------|--|-----------------|
| Active Leaders in (All Clubs) | | | | | |
| Leader | | Mailing Name and Address | Contact Info | | |
| Allan, Jack Leader | Journey | Mr Jack Allan 41 Birchwood Circle Madison, WI 53714 | Cell Phone | (608) 858-8555 | Jack |
| | | | Cell Phone | (608) 858-8556 | Janice |
| | | | Home Phone | (608) 878-8787 | Jack or Janice |
| Allan, Janice Leader/Other | T&T Adventure | Mrs Janice Allan 41 Birchwood Circle Madison, WI 53714 | Cell Phone | (608) 858-8555 | Jack |
| | | | Cell Phone | (608) 858-8556 | Janice |
| | | | Home Phone | (608) 878-8787 | Jack or Janice |
| Arlington, Marissa Leader | Journey | Mrs Marissa Arlington 356 Semester Drive Madison, WI 53714 | Cell Phone | 699-588-5511 | Gavin |
| | | | E-mail | maglcm@yahoo.com | Marissa |
| | | | E-mail | gavnari@yahoo.com | Gavin |
| | | | Home Phone | 699-588-9636 | Marissa & Gavin |
| Blakemore, Claudia Leader/Other | T&T Adventure | Mrs Claudia Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714 | Cell Phone | (325) 987-4510 | Joseph |
| | | | E-mail | joe@securityservices.com | Joseph |
| | | | E-mail | claudiab@gmail.com | Claudia |
| | | | Home Phone | 608-555-3751 | Mr. Blakemore |
| Blakemore, Joseph Sparks Director | Sparks boys | Mr Joseph Blakemore 6000 Rodeo Dr Apt 2 Madison, WI 53714 | Cell Phone | (325) 987-4510 | Joseph |
| | | | E-mail | joe@securityservices.com | Joseph |
| | | | E-mail | claudiab@gmail.com | Claudia |

17.14 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

Report: Leader Service History

Description: This report will print a list of leaders and their history of service (based on the Service History records).
Note: Records used in this report are those displayed in the grid under the Leadership tab of the Member form. The Total Years of Service are displayed separately from Service Pin Years, which indicate years of service that qualify toward the Service Pin Award.

Report Type

Detailed - Includes Name, Total Years of Service and Service Pin years followed by details for each year.
 Summary - Includes Name, Total Years of Service and Service Pin years

Selection Criteria

All Leaders who served in any club year
 Only Leaders who served in : 2012-2013
 Include all service records that meet the criteria for selected leaders

Leadership Role: * (All Roles)
Club Name: * (All Clubs)
Member Status: (All Statuses)
Member Code: (blank = all codes)
Service Pin: (All)

* Pertains to the value(s) stored in the Service History records, which may be different from a leader's current role and club name.

Sort by

Leader Name - Years of Service - Service Pin
 Leader Name - Service Pin - Years of Service
 Years of Service (low to high) - Name - Service Pin
 Years of Service (high to low) - Name - Service Pin
 Service Pin Years (low to high) - Years of Service - Name
 Service Pin Years (high to low) - Years of Service - Name

Options

Include the leader's attendance ratio for the current year

Print Preview Close

Example Output

Report Type: Detailed

| Leader Service History | | (All Clubs) | | ASC Awana Club | | | |
|---|----------|-------------|-----|--|------------------|---------------|------|
| (All Statuses) Leaders who served in 2015-2016 | | | | 4917 Milwaukee Street Madison, WI 53714 | | | |
| Leadership Roles: (All Roles) | | | | | | | |
| <u>Leader Name - Total Years Served - Service Pin Years</u> | | | | | | | |
| 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 | <input checked="" type="checkbox"/> | Leader | Awana | |
| Allan, Jack - 8 Yrs Total - 8 Yr Pin | | | | | | | |
| 2015-2016 | 9/9/2015 | 4/27/2016 | 1 | <input checked="" type="checkbox"/> | Journey Director | Journey | |
| Allan, Janice - 4 Yrs Total - 4 Yr Pin | | | | | | | |
| 2015-2016 | 9/9/2015 | 4/27/2016 | 1 | <input checked="" type="checkbox"/> | Leader | T&T Adventure | |
| Arlington, Marissa - 7 Yrs Total - 7 Yr Pin | | | | | | | |
| 2015-2016 | 9/9/2015 | 4/27/2016 | 1 | <input checked="" type="checkbox"/> | 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 2015-2016 | | | | 4917 Milwaukee Street Madison, WI 53714 | |
| Leadership Roles: (All Roles) | | | | | |
| <u>Leader Name - Total Years Served - Service Pin Years</u> | | | | | |
| 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 | | | | | |

17.15 Leader Training History

This report provides information pertaining to a leader's training and qualifications including descriptions, completion status and dates.

Report Dialog

Example Output

| Leader Training History | | (All Clubs) | | ASC Awana Club 4917 Example Street Madison, WI 53714 | |
|--|-----------------|------------------|-------------|--|--|
| Active Leaders as of 11/19/2014 | | | | | |
| <u>Leader Name</u> | | | | | |
| <u>Description of Training / Qualification</u> | <u>Required</u> | <u>Completed</u> | <u>Date</u> | <u>Note</u> | |
| 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 | Yes | Yes | 8/1/2007 | | |

17.16 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

Report: Mailing Labels

Description: This report will produce output formatted for use with the 1" x 2 5/8" 30/page sheets of mailing labels (such as Avery 5160 or 8160).

Selection Criteria

Select from

Households All Members Clubbers Only Leaders Only

with at least one member in

Club Name: (All Clubs)

Team Name: (All Teams)

Household Status: (All Statuses)

Member Code: (blank = all codes)

Select only members ... who were absent on the club date of 9/25/2013

Exclude the Leader-only Households (those without Clubbers)

include only the names checked in the following list

None selected

Options

Include the Parent's Name when a label is addressed to a Clubber

Use "c/o" in front of the Parent's Name when label is addressed to a Clubber

Do not print a label if the Parent's Name is blank

Do not print a label if the Address Line is blank

Skip: 0 Top Margin Adj: 0

Print Preview Close

Example Output

| | | |
|--|--|--|
| Adler Family 833 Prasario Drive Apt 3b Madison, WI 53714 | Farmer Family - Jonah, Kim, Nathan, P 895 Countryside Lane Madison, WI 53714 | Marie Svenson 123 Open Sesame Street Madison, WI 53704 |
| Allan Family 41 Birchwood Circle Madison, WI 53714 | Haley Watson 12345 Sherlock Avenue Apt 3B Madison, WI 53714 | Maxwell Family 2373 Aviator Street Madison, WI 53714 |
| Arlington Family 356 Semester Drive Madison, WI 53714 | Harmon Family 110 Windswept Lane Madison, WI 53716 | Moore Family 8216 Major Ave. Madison, WI 53714 |

17.17 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

Report: Medical List

Description: A listing of Members with one or more medical concerns. The report includes name, contact, allergies, medical notes, doctor and dentist information.

Note: To be included in this report, the member's "Include on Medical Listing" checkbox must be checked.

Selection Criteria

Club Name: (All Clubs)

Team Name: (All Teams)

Member Type: Clubber

Member Status: (All Statuses)

Member Code: (blank = all codes)

Print Preview Close

Example Output

| Medical Listing | | — CONFIDENTIAL — | | ASC Awana Club | |
|-------------------------------------|-----------------|--|-----------------------------------|--|--|
| (All Statuses) Clubbers (All Teams) | | (All Clubs) | | 4917 Example Street Madison, WI 53714 | |
| Adler, Andy | | | | | |
| Male | age: 12 | Bill and Susan Adler | Cell Phone (715) 987-9112 | Bill Adler, father | |
| Gr: 6 | dob: 5/2/2002 | 833 Presario Drive Apt 3b Madison, WI 53714 | Emergency (608) 654-2145 | Ariene Adler, grandmother | |
| | | | Home Phone (608) 987-9123 | | |
| Allergic To: Peanuts | | | | | |
| Baker, Charles (Chaz) | | | | | |
| Male | age: 17 | Rebecca Stearns | Emergency (608) 555-9074 | Sara Paulis (neighbor) | |
| Gr: 11 | dob: 10/25/1997 | 800 Coolidge Dr Sun Prairie, WI 53527 | Home Phone (608) 555-4803 | | |
| Allergic To: Dust mites | | | | | |
| Clark, Ethan | | | | | |
| Male | age: 15 | Mr and Mrs Clark | Cell Phone (715) 584-4320 | Ethan | |
| Gr: 9 | dob: 1/3/1999 | 15 Zagnut Lane Madison, WI 53714 | Cell Phone (741) 852-8522 | Rachael | |
| | | | E-mail ethan@myemail.com | Ethan | |
| Allergic To: Ibuprofen / Motrin | | | | | |
| | | | E-mail rachael@yahoo.com | Rachael | |
| | | | Home Phone (715) 582-0001 | Brian or Sharon | |
| | | | Doctor: Dr. Dukas, (715) 584-2012 | | |
| Clark, Rachael | | | | | |
| Female | age: 13 | Mr and Mrs Clark | Cell Phone (715) 584-4320 | Ethan | |
| Gr: 7 | dob: 7/6/2001 | 15 Zagnut Lane Madison, WI 53714 | Cell Phone (741) 852-8522 | Rachael | |
| | | | E-mail ethan@myemail.com | Ethan | |
| Allergic To: Dairy | | | | | |
| | | | E-mail rachael@yahoo.com | Rachael | |
| | | | Home Phone (715) 982-0001 | Brian or Sharon | |
| | | | Doctor: Dr. Dukas, (715) 584-2012 | | |

17.18 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 and team names. For clubbers, age, date of birth, grade and parent names are also included.

Report Dialog

Report: Member List with Photos







Description: A list of members including their photo, name, address, primary phone, (and up to three additional phones), club and team name. Age, dob, grade, and parent names are also included for clubbers.

| | |
|--|---|
| <p>Selection Criteria</p> <p>Club Name: (All Clubs) <input type="text"/></p> <p>Team Name: (All Teams) <input type="text"/></p> <p>Member Type: Clubber <input type="text"/></p> <p>Member Status: Active <input type="text"/></p> <p>Member Code: <input type="text"/> (blank = all codes)</p> | <p>Group By</p> <p><input checked="" type="radio"/> <none></p> <p><input type="radio"/> Club Name</p> <p><input type="radio"/> Grade</p> <p><input type="radio"/> Team Color</p> <p><input type="radio"/> Team Name</p> <p><input type="radio"/> Leader Name</p> <p>Sort By</p> <p><input type="radio"/> First Name</p> <p><input checked="" type="radio"/> Last Name</p> |
|--|---|

Example Output

Member List with Photos — CONFIDENTIAL — ASC Awana Club

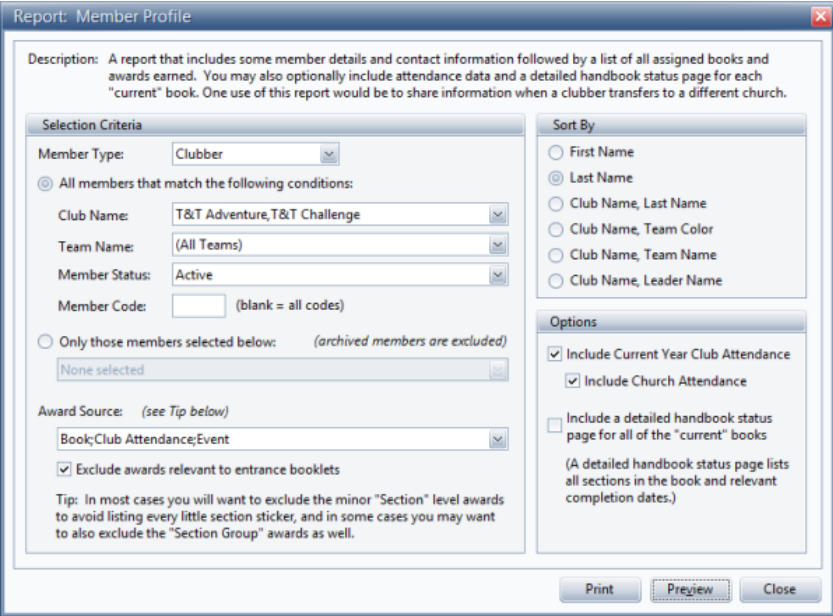
(All Clubs) 4917 Example Street
 Active Clubbers, (All Teams) Sorted by Last Name Madison, WI 53714

| | |
|--|--|
|  <p>Allan, Jaqueline Female age 9 dob 11/23/2007 Gr K Sparks girls Jewels Parent: Mr and Mrs Allan 41 Birchwood Circle Madison, WI 53714 Home Phon (808) 878-8787 Jack or Janice Cell Phone (808) 858-8556 Janice Cell Phone (808) 858-8555 Jack</p> |  <p>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 (808) 985-1247</p> |
|  <p>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 (808) 878-8787 Jack or Janice Cell Phone (808) 858-8556 Janice Cell Phone (808) 858-8555 Jack</p> |  <p>Kaedle, Stephanie (Stephie) Female age 17 dob 2/22/1997 Gr 12 Journey Parent: Ted & Lana Kaedle 5028 Serendipity Rd. Madison, WI 53716 Home Phon (808) 555-8276 Cell Phone (808) 931-2123 Steph</p> |
|  <p>Carson, Benjamin (Ben) Male age 12 dob 9/25/2002 Gr 6 T&T Challenge Parent: Mr and Mrs Carson 34 Wanescoat Dr Sun Prairie, WI 53590 Home Phon (808) 555-1278</p> |  <p>Maretti, Anna Female age 14 dob 1/14/2000 Gr 8 Trek Parent: Susan and Joe Maretti 31210 Lanagstrom Lane Madison, WI 53713 Home Phon (808) 555-1809 Emergency (808) 555-8804 Susan Jaro</p> |

17.19 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

Handbook and Award History - CONFIDENTIAL - **ASC Awana Club**
 for Mr Caleb Eliot 4917 Milwaukee Street
 prepared on 2/13/2019 Madison, WI 53714

Member
 Member Type: Clubber
 Status: Active
 First Name: Caleb
 Last Name: Eliot
 Suffix:
 Nickname:
 Preferred: Caleb
 Filing Name: Eliot, Caleb
 Mailing Name: Mr Caleb Eliot
 Gender: Male Grade: 4
 Birth Date: 1/22/2009 Age: 10
 Current Club: T&T Adv.
 Current Team: Red

Household
 Filing Name: Eliot, Erin, Caleb
 Mailing Name: Eliot Family
 Parent(s): Mr and Mrs Eliot
 Address: 8883 Somerset Ln.
 Sun Prairie, WI 53442
 Family Church:

2018-2019 Attendance (Club attendance ratio: 17 of 40)

| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 8/20 | 8/27 | 9/3 | 9/10 | 9/17 | 9/24 | 10/1 | 10/8 | 10/15 | 10/22 | 10/29 | 11/5 | 11/12 | 11/19 | 11/26 | 12/3 | 12/10 | 12/17 | 12/24 | 1/7 | 1/14 | 1/21 | 1/28 | 2/4 | 2/11 | 2/18 | 2/25 | 3/4 | 3/11 | 3/18 | 3/25 | 4/1 | 4/8 | 4/15 | 4/22 | 4/29 | 5/6 | 5/13 | 5/20 | 5/27 | 6/3 | 6/10 | | | | | | |
| Club: | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Church: | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Handbook History


| Current | Item # | Book Name | % Complete | Date Completed | Club Year Completed | Book Awards Earned |
|-------------------------------------|--------|---------------------------|------------|----------------|---------------------|--|
| | 41427 | Bear Hug Brochure (Yr1) | 100 | 9/12/2012 | 2012-2013 | |
| | 44302 | Hopper Celebrations | 100 | 4/10/2013 | 2012-2013 | Cubbies Year One Book Award Hopper VIP Diploma |
| | 92640 | Apple Acres Booklet (Yr1) | 100 | 9/11/2013 | 2013-2014 | Cubbies Green Apple Achievement Emblem |
| | 92892 | AppleSeed | 100 | 4/16/2014 | 2013-2014 | Now eligible for Cubbies uniform and book AppleSeed Book Award |
| | 74113 | Flight 3:16 | 100 | 9/10/2014 | 2014-2015 | Now eligible for Sparks uniform and book Sparks Membership Card |
| | 74190 | HangGlider | 100 | 2/25/2015 | 2014-2015 | Sparks First Book Award Ribbon |
| | 78001 | WingRunner | 100 | 4/27/2016 | 2015-2016 | Sparks Second Book Award Ribbon |
| | 34154 | Start Zone (Yr1) | 100 | 8/29/2016 | 2016-2019 | Now eligible for T&T UA uniform and book |
| <input checked="" type="checkbox"/> | 34565 | Evidence of Grace | 19 | | | |

Awards
 Award Source(s): Book

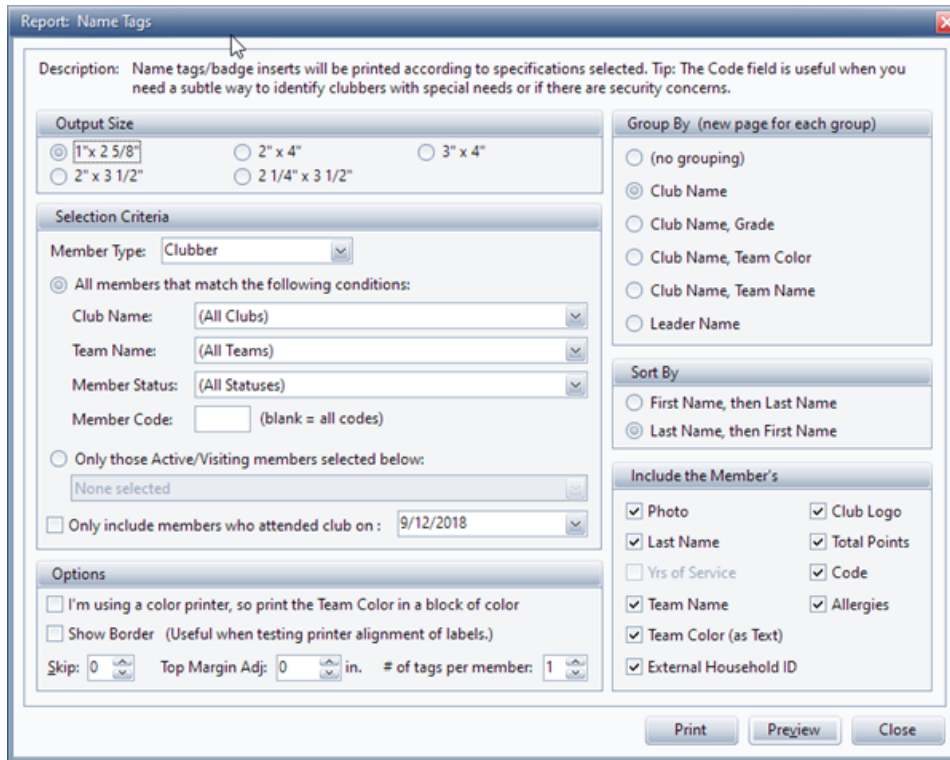
| Club Year | Item # | Award Name | Received Note |
|-----------|--------|--------------------|-------------------------------|
| 12-2013 | 41484 | Hopper VIP Diploma | Completed Hopper Celebrations |

17.20 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



Report: Name Tags

Description: Name tags/badge inserts will be printed according to specifications selected. Tip: The Code field is useful when you need a subtle way to identify clubbers with special needs or if there are security concerns.

Output Size

1" x 2 5/8" 2" x 4" 3" x 4"

2" x 3 1/2" 2 1/4" x 3 1/2"

Selection Criteria

Member Type:

All members that match the following conditions:

Club Name:

Team Name:

Member Status:

Member Code: (blank = all codes)

Only those Active/Visiting members selected below:

Only include members who attended club on:

Options

I'm using a color printer, so print the Team Color in a block of color

Show Border (Useful when testing printer alignment of labels.)

Skip: Top Margin Adj: in. # of tags per member:

Group By (new page for each group)

(no grouping)

Club Name

Club Name, Grade

Club Name, Team Color

Club Name, Team Name

Leader Name

Sort By

First Name, then Last Name

Last Name, then First Name

Include the Member's

Photo Club Logo

Last Name Total Points

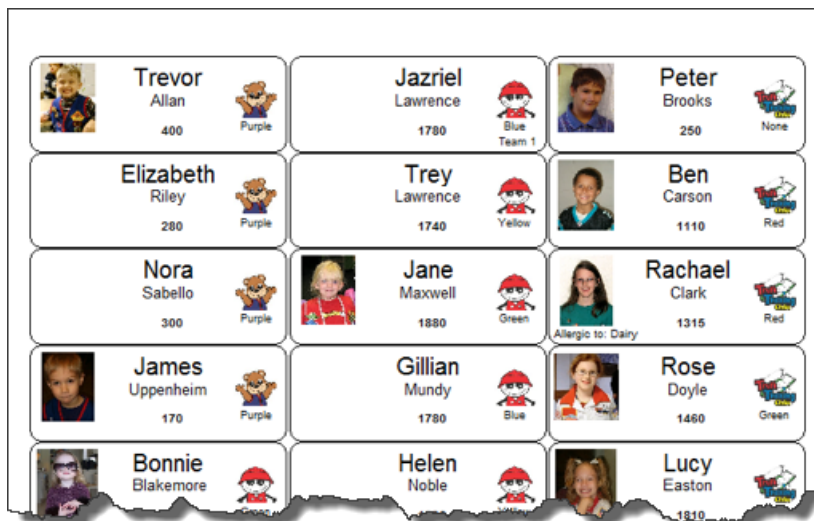
Yrs of Service Code

Team Name Allergies

Team Color (as Text)


External Household ID

Example Output



17.21 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

Report: Point List and Worksheet

Description: A list of members and their net points. This report may be useful for Store Night because 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.

Tip: Go to Tools > Club Store to enter the number of points spent.

Selection Criteria

Club Name: (All Clubs)

Team Name: (All Teams)

Member Type: Clubber

Member Status: (All Statuses)

Member Code: (blank = all codes)

Group By

<none>

Club Name

Club Name, Team Color

Club Name, Team Name

Sort By

First Name

Last Name

Points (Highest to Lowest)

Options

Print each Group on a separate page

Print Preview Close

Example Output

| Point Listing as of 11/20/2014 | | | (All Clubs) | | | ASC Awana Club | | |
|--------------------------------|--------------|-------|--------------------------|--------------|-------|--|--|--|
| (All Statuses) Clubbers | | | (All Teams) | | | 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 | _____ | Brackenhaimer, Kati | 110 | _____ | | | |
| Elliot, 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 | _____ | | | |
| Mc, Stephanie | 40 | _____ | Selden, Sawyer | 90 | _____ | | | |

17.22 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

Report: Receipts Report

Description: 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. Totals for Offerings/Donations are also included.

Tip: This may be useful as a report to the Treasurer to account for monies received.

Report Type

Summary (no Payment records are listed, just the Report Summary is shown)

Detail (each Payment is listed and grouped by Date Received and Type)

Selection Criteria

Select Payments received within the date range specified:

From: 9/4/2013 To: 9/25/2013

Print Preview Close

Example Output

Report Type: Summary

| Receipts Report | | ASC Awana Club | |
|--|--------------------------------|--|--|
| Payments received from 9/4/2013 to 9/25/2013 | | 4917 Example Street Madison, WI 53714 | |
| Report Summary for 9/4/2013 to 9/25/2013 | | | |
| Sum of Actual* Payments and Offerings: | | \$40.25 | Notes |
| Payment Information | <u>Amount</u> <u>Unapplied</u> | | |
| 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: | | | |
| <u>Fund ID</u> <u>Offering/Donation Fund Name</u> | <u>Amount</u> | | ** "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. |
| 2 Missions | \$5.25 | | |
| | \$5.25 | | 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 | Alen - 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 | Notes |
|-----------------------------|---------|-----------|-------|
| 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 |


* "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.

17.23 Registration Form

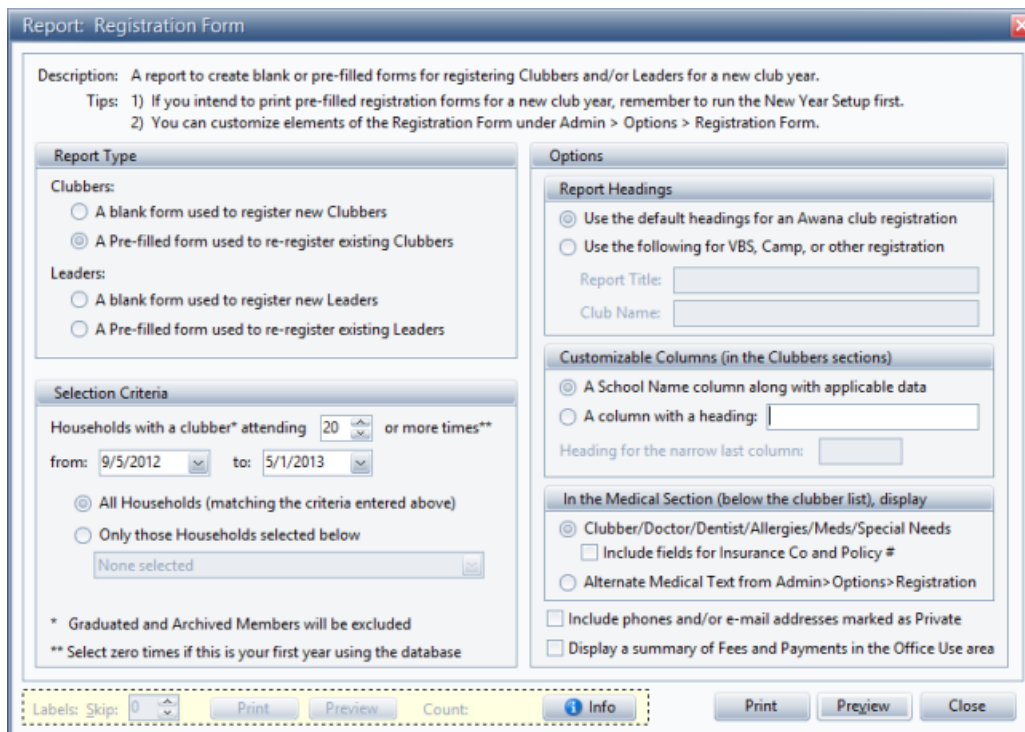
This report creates blank or pre-filled forms for registering clubbers and/or leaders for a new club year.

 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. See the information about how to [use AWdb to track VBS](#) or other summer programs.

Report Dialog



Report: Registration Form

Description: A report to create blank or pre-filled forms for registering Clubbers and/or Leaders for a new club year.
Tips: 1) If you intend to print pre-filled registration forms for a new club year, remember to run the New Year Setup first.
 2) You can customize elements of the Registration Form under Admin > Options > Registration Form.

Report Type

Clubbers:

- A blank form used to register new Clubbers
- A Pre-filled form used to re-register existing Clubbers

Leaders:

- A blank form used to register new Leaders
- A Pre-filled form used to re-register existing Leaders

Selection Criteria

Households with a clubber* attending or more times**

from: to:

- All Households (matching the criteria entered above)
- Only those Households selected below

* Graduated and Archived Members will be excluded
 ** Select zero times if this is your first year using the database

Options

Report Headings

- Use the default headings for an Awana club registration
- Use the following for VBS, Camp, or other registration

Report Title:

Club Name:

Customizable Columns (in the Clubbers sections)

- A School Name column along with applicable data
- A column with a heading:

Heading for the narrow last column:

In the Medical Section (below the clubber list), display

- Clubber/Doctor/Dentist/Allergies/Meds/Special Needs
- Include fields for Insurance Co and Policy #
- Alternate Medical Text from Admin>Options>Registration
- Include phones and/or e-mail addresses marked as Private
- Display a summary of Fees and Payments in the Office Use area

Labels: Skip: Count:

Example Output

Pre-filled Clubber Registration Form

| | | | | | | | | | |
|--|------------------------------|--|---|---------------|--------------|---------------|--------------|-------------------------------------|-------------------------------------|
| Awana Clubber Registration | - CONFIDENTIAL - | ASC Awana Club 4917 Example Street Madison, WI 53714 | | | | | | | |
| Club Year: 2013-2014 | - Please Print - | | | | | | | | |
| 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. | | | | | | | | | |
| <hr/> | | | | | | | | | |
| Allan - Jack, Janice, Trevor, Jaqueline | | | | | | | | | |
| Parent(s): Mr and Mrs Allan | Cell Phone: (608) 858-8555 | Contact Person: Jack | | | | | | | |
| Address: 41 Birchwood Circle | Cell Phone: (608) 858-8558 | Janice | | | | | | | |
| Madison, WI 53714 | E-mail: | | | | | | | | |
| Home: | Emergency: | | | | | | | | |
| Church: East Madison Baptist Church | Home Phone: (608) 878-8787 | Jack or Janice | | | | | | | |
| Persons (other than parents) authorized to pick up the children: | Work Phone: | | | | | | | | |
| <hr/> | | | | | | | | | |
| Register | Child's Name | Nickname | Birth Dat | Gender | Grade | School | Club | Need Book | Need Uniform |
| <input type="checkbox"/> | Jaqueline Allan | | 11/23/2007 | Female | K | | Sparks girls | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Trevor Allan | | 2/19/2008 | Male | 2 | | Sparks boys | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <hr/> | | | | | | | | | |
| Clubber | Doctor Name and Phone | Dentist Name and Phone | Allergies / Meds / Special Needs | | | | | | |
| Jaqueline | | | | | | | | | |
| Trevor | | | | | | | | | |
| <hr/> | | | | | | | | | |
| 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 time is 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 _____ Date _____ | | | | | | | | | |
| Signature of Parent/Guardian | | | | | | | | | |
| <hr/> | | | | | | | | | |
| - CONFIDENTIAL - | | | | | | | | | |
| 11/20/2014 12:14:42 PM | | | | | | | | | |

Pre-filled Leader Registration Form

| | | | |
|--|------------------------|--|--|
| Awana Leader Registration | | ASC Awana Club | |
| Club Year: 2013-2014 | | 4917 Example Street Madison, WI 53714 | |
| - Please Print - | | | |
| 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 | | Phone / E-Mail Address | |
| Filing Name: Allan, Jack | Cell Phone | (606) 858-8555 | Jack |
| Address: 41 Birchwood Circle | Cell Phone | (606) 858-8558 | Janice |
| Madison, WI 53714 | E-mail | | |
| Birth Date: _____ | Gender: Male | Emergency | |
| | | Home Phone (606) 878-8787 | Jack or Janice |
| Home Church: East Madison Baptist Church | Work Phone | | |
| Awana Service History | | | |
| <u>Club</u> | <u>Leadership Role</u> | <u>Club Year</u> | <u>Church Name</u> |
| 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 | | Medical Information (use the back of this form if needed) | |
| <u>Description</u> | <u>Date</u> | <u>Note</u> | <u>Allergies / Conditions / Special Needs or Concern</u> |
| Line Judge Certification | 3/24/2012 | | |
| Getting Started - Part 2 | 8/18/2007 | | |
| Getting Started Training - Part 1 | 8/11/2007 | | |
| Child Protection Training | 11/8/2004 | | |
| Background Check | 8/13/2003 | | |
| Service Opportunities | | | |
| What groups of children do you prefer to work with? | | | |
| <input type="checkbox"/> Nursery <input type="checkbox"/> Pre-school <input type="checkbox"/> K-2nd Gr <input type="checkbox"/> 3rd-4th Gr <input type="checkbox"/> 7th-8th Gr <input type="checkbox"/> 9th-12th Gr | | | |
| What Leadership Roles are you interested in? | | | |
| <input type="checkbox"/> Listener <input type="checkbox"/> Leader <input type="checkbox"/> Director <input type="checkbox"/> Game Director <input type="checkbox"/> Music <input type="checkbox"/> Recordkeeping <input type="checkbox"/> Council Time | | | |
| <input type="checkbox"/> Special Events <input type="checkbox"/> Other: _____ | | | |
| CPR Trained? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |
| Terms and Conditions | | Office Use | |
| << Enter your own church-approved text here. | | << Use this area to track club assignments, uniform and/or book needs, completion of other requirements, LIT indicator, mtc notes, date the info was updated in AW, etc. Customize the text under Admin > Options > Registration Form > Office Use. >> | |
| Items to consider including: | | | |
| 1) Commitment 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 | |
| 11/20/2014 12:20:05 PM * Phone numbers and E-Mail addresses marked as private will be considered confidential | | | |

17.24 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).

Report Dialog

Report: Visitor List

Description: A list of visitors including their name, date visited and the name of the members who brought them.
(Note: The Clubber List - Contact Information report contains a "Visitor follow-up option" and is well suited for that task.)

Report Type

1. List each member, followed by the visitors they brought and the date of their visit
 2. List each visitor, followed by the member who brought them and the date of their visit
 3. List each club date and the total number of visitors (no member or visitor details)

Selection Criteria

Visited in Club Year: 2013-2014
 Visited . . . From: 9/4/2013 To: 9/25/2013

The "Brought By" Member's

Club Name: (All Clubs)
 Team Name: (All Teams)
 Member Type: Clubber
 Member Code: (blank = all codes)

Group By

<none>
 Date
 Club Name
 Date, Club Name
 Date, Club Name, Team Color
 Date, Club Name, Team Name

Sort By

First Name
 Last Name

Options

Apply shading to alternating rows using this color: PaleTurquoise

Print Preview Close

Example Output

Report Type #1

Visitor List (All Clubs) ASC Awana Club
 Clubbers who brought visitors from 9/4/2013 to 9/25/2013 (All Teams) 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.

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

18

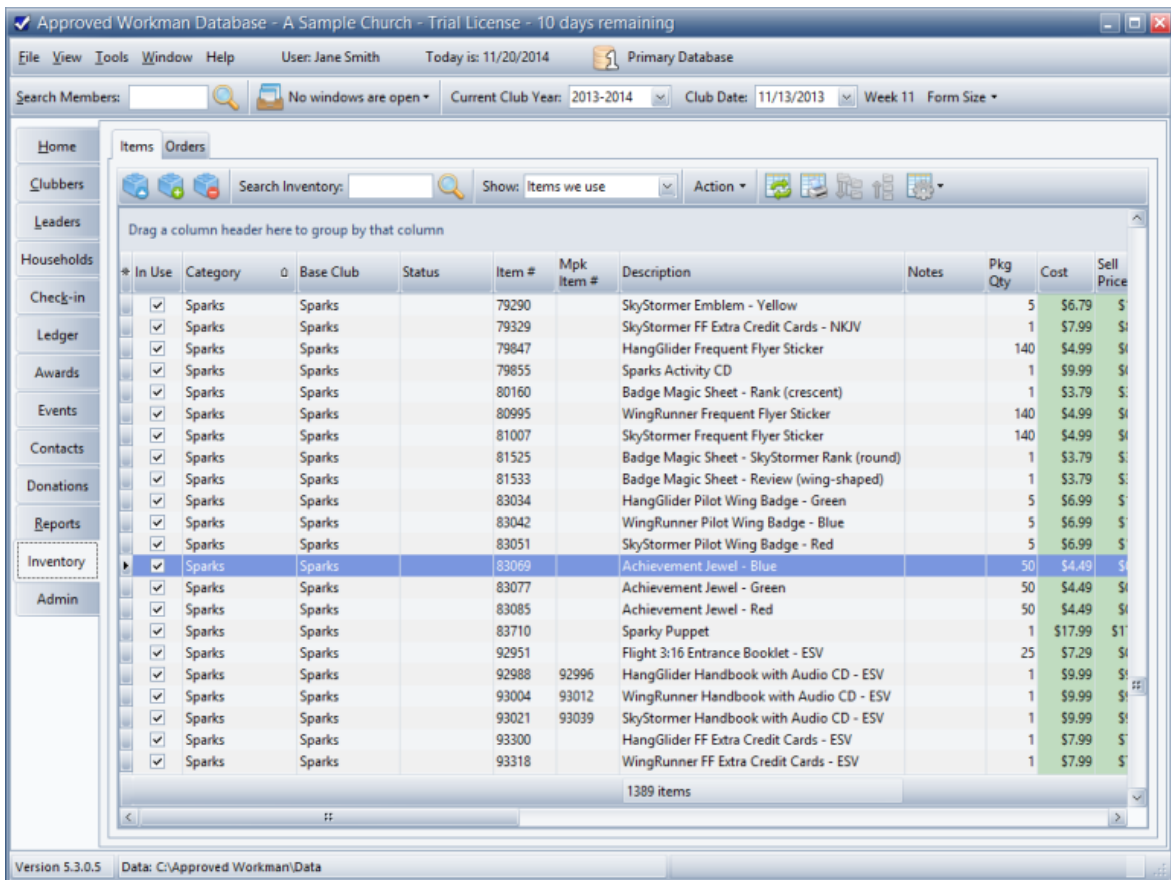
18 The Inventory Module

 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. By setting re-order levels, the Inventory Module will proactively 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.

 Example of automated inventory: with [Inventory Tracking](#) preferences set, when an award record is generated, the award item is deducted from the item's quantity in stock. If the item's quantity is low enough to trigger an order, it is added to an open order or a new order is created. After [placing the order](#), when the item is received, the item's quantity in stock is increased.

The Inventory page manages [Items](#) and [Orders](#). For an overview, see [Working with Inventory](#).



Approved Workman Database - A Sample Church - Trial License - 10 days remaining
 User: Jane Smith Today is: 11/20/2014 Primary Database
 Search Members: [] No windows are open Current Club Year: 2013-2014 Club Date: 11/13/2013 Week 11 Form Size []

Home | **Items** | Orders

Search Inventory: [] Show: Items we use Action []


Drag a column header here to group by that column


| In Use | Category | Base Club | Status | Item # | Mpk Item # | Description | Notes | Pkg Qty | Cost | Sell Price |
|-------------------------------------|----------|-----------|--------|--------|------------|---|-------|---------|---------|------------|
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 79290 | | SkyStormer Emblem - Yellow | | 5 | \$6.79 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 79329 | | SkyStormer FF Extra Credit Cards - NKJV | | 1 | \$7.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 79847 | | HangGlider Frequent Flyer Sticker | | 140 | \$4.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 79855 | | Sparks Activity CD | | 1 | \$9.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 80160 | | Badge Magic Sheet - Rank (crescent) | | 1 | \$3.79 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 80995 | | WingRunner Frequent Flyer Sticker | | 140 | \$4.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 81007 | | SkyStormer Frequent Flyer Sticker | | 140 | \$4.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 81525 | | Badge Magic Sheet - SkyStormer Rank (round) | | 1 | \$3.79 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 81533 | | Badge Magic Sheet - Review (wing-shaped) | | 1 | \$3.79 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83034 | | HangGlider Pilot Wing Badge - Green | | 5 | \$6.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83042 | | WingRunner Pilot Wing Badge - Blue | | 5 | \$6.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83051 | | SkyStormer Pilot Wing Badge - Red | | 5 | \$6.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83069 | | Achievement Jewel - Blue | | 50 | \$4.49 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83077 | | Achievement Jewel - Green | | 50 | \$4.49 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83085 | | Achievement Jewel - Red | | 50 | \$4.49 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 83710 | | Sparky Puppet | | 1 | \$17.99 | \$1 |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 92951 | | Flight 3:16 Entrance Booklet - ESV | | 25 | \$7.29 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 92988 | 92996 | HangGlider Handbook with Audio CD - ESV | | 1 | \$9.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 93004 | 93012 | WingRunner Handbook with Audio CD - ESV | | 1 | \$9.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 93021 | 93039 | SkyStormer Handbook with Audio CD - ESV | | 1 | \$9.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 93300 | | HangGlider FF Extra Credit Cards - ESV | | 1 | \$7.99 | \$ |
| <input checked="" type="checkbox"/> | Sparks | Sparks | | 93318 | | WingRunner FF Extra Credit Cards - ESV | | 1 | \$7.99 | \$ |

1389 items

Version 5.3.0.5 Data: C:\Approved Workman\Data

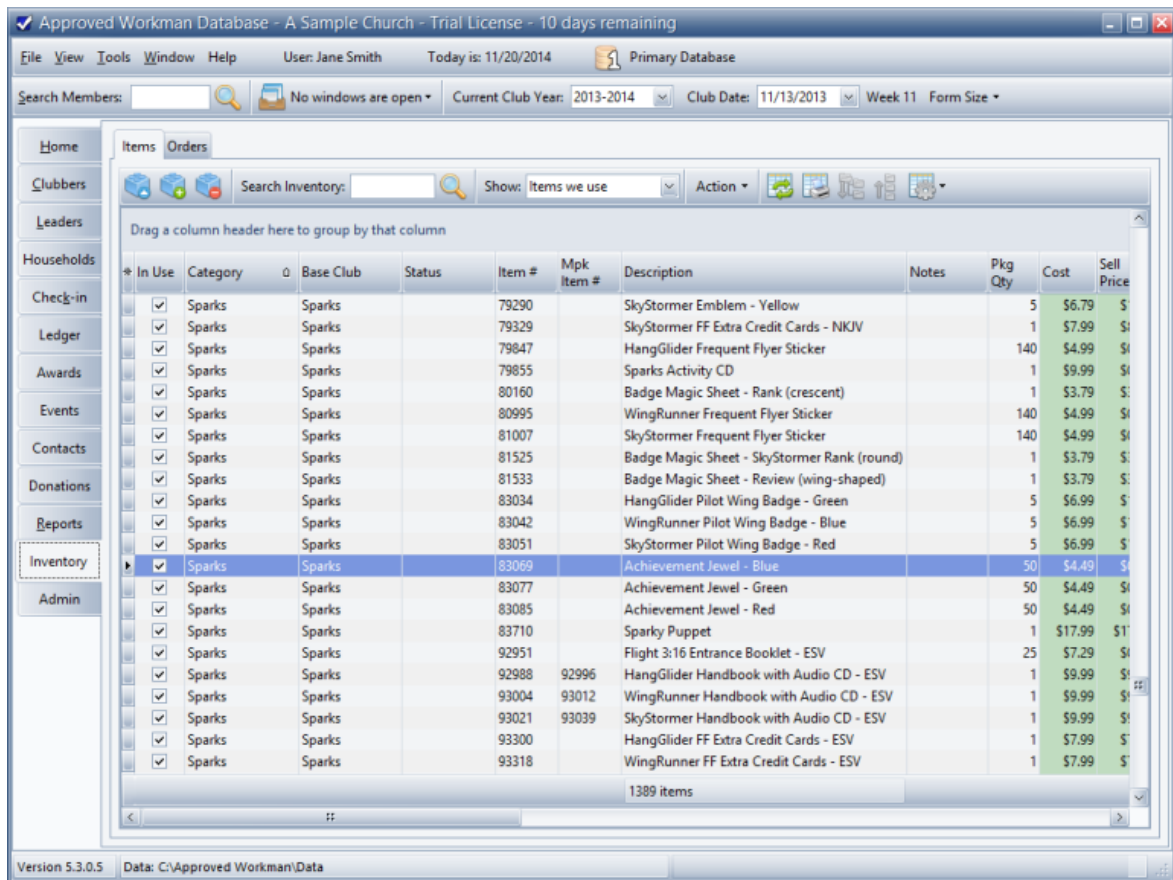
18.1 Items

 Click on the **Inventory > Items** tab to open, add, or delete inventory items.

 AWdb periodically updates the inventory, 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


| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|-------------|-----------------------------------|---|
| | 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 , or Items we do not use . |

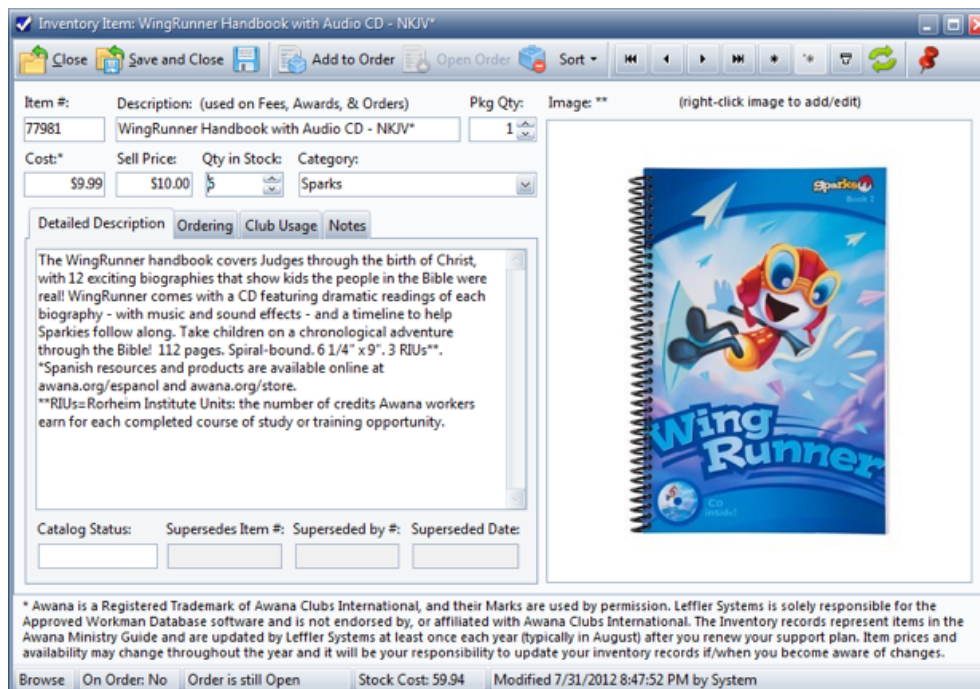
| | | |
|---|------------------------------------|--|
|  | Add Item to Order* | Adds the selected item to an open order. A new Order will be created if there is not one currently open. |
|  | Mark Item(s) as In Use* | Marks the selected item(s) as one(s) that your Awana program uses. |
|  | Mark Item(s) as Not In Use* | Marks the selected item(s) as one(s) that your Awana program does <i>not</i> 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.

18.1.1 The Inventory Item Window

 Opening or creating a new Inventory Item opens the Inventory Item window to view, modify or enter details of an item.



Toolbar

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|---------------------------|--|
|  | 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. |
|  | Delete Item | Removes the item(s). We recommend not deleting items. Instead, set the item as being "Not in Use". |
| | 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 information in the Awana catalog. For items you buy elsewhere, set as desired. The search box works on these fields.
- **Pkg Qty** - number of items that come 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 placed in an order. It should match Awana's current catalog price, if applicable.
- **Sell Price** - amount used when a fee is created.



If your club does not have a large budget, consider slightly increasing the **Sell Price** of items like uniforms and books to help cover shipping costs.

- **Qty in Stock** - number of the item you currently have. The default is 0. If [Inventory Tracking](#) preferences are set, this value is adjusted automatically as items are depleted by [assigning books](#), when [awards are earned](#), or when manually [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 which is 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 will be provided. It can be modified by right clicking on it to paste or load an image from a file.

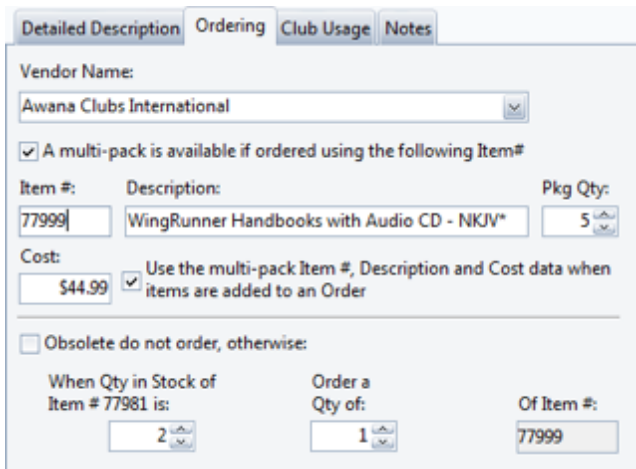
Detailed Description

The main area in this tab is for a detailed description of the item. This will normally match the text found in 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. It could get confusing to maintain, but by renewing the AWdb Support Plan each year, these details will all be maintained. Otherwise, this is where to 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, with Inventory Tracking options turned on, these fields indicate when the item should be added to an order and how many to order.

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

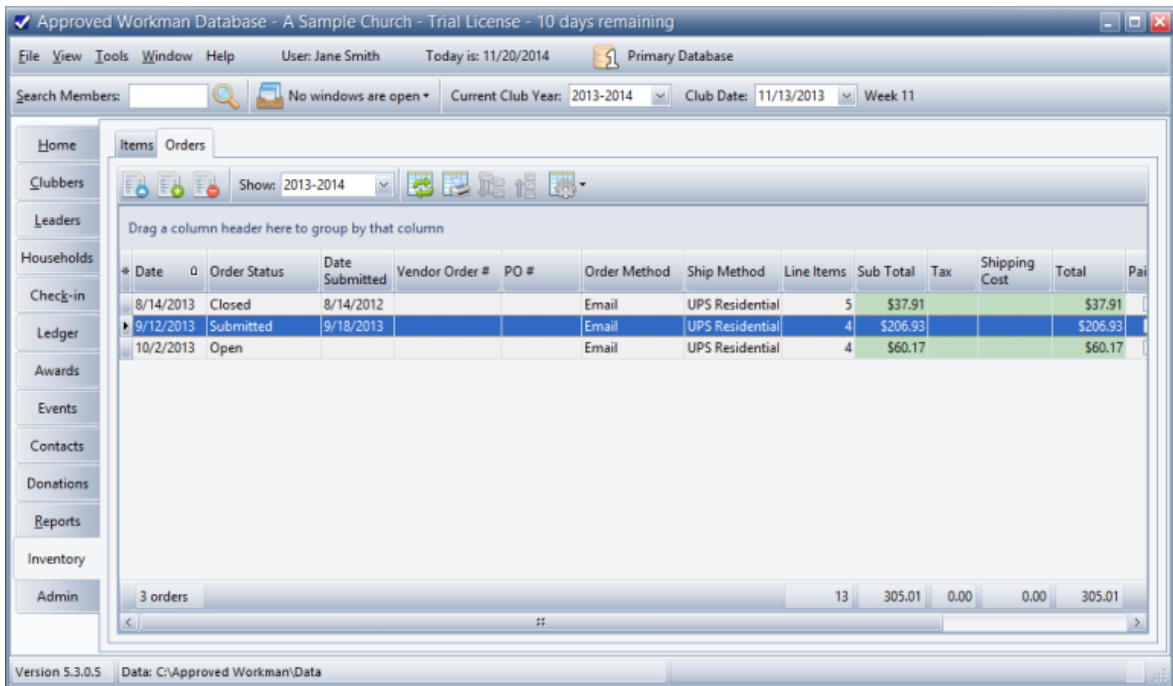
Use this area to track any additional information related to the item.





18.2 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 AWdb does not actually place the order with Awana Clubs International. It is only a tool to help in the process.



| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|------------------------------|---|
|  | 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. |

18.2.1 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 AWdb does not actually place the order with Awana Clubs International, but can assist in [placing the order](#).

Order : 10/2/2013

Club Year: 2013-2014 Order Date: 10/2/2013 Purchase Order: Order Method: Email Shipping Method: UPS Residential Vendor Order #: Invoice #: Order Status: Open

Comments: *Comments entered here will appear on the printed order form*

Ship To: Janice Allan, 876 Worth Ave, Madison WI 53714

Submitted: Invoice Paid: Payment Ref:

New Line Item Save Line Item Delete Line Item Open Inventory Item Grid

The order is Open, and line items may be added, edited, or deleted.

| Line # | Item Number | Description | Expense Category | Pkg Qty | Qty Ordered | Cost | Extension |
|--------|-------------|--|------------------|---------|-------------|---------|-----------|
| 1 | 47108 | Awana Grand Prix Trophy Design Plates | General | 3 | 1 | \$1.99 | \$1.99 |
| 2 | 95165 | Awana Grand Prix Participation Certificate | General | 10 | 1 | \$3.29 | \$3.29 |
| 3 | 95174 | Awana Grand Prix Poster Set | General | 3 | 1 | \$4.99 | \$4.99 |
| | | | | | | \$10.27 | 10.27 |




Notes: *Comments entered here will not appear on the printed order form. They are for your internal use only.*

Sales Tag: Shipping/Handling: Total: \$10.27

Browse Order ID: 81 Created 11/20/2014 3:06:48 PM Modified 11/20/2014 3:08:15 PM by Jane


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 <i>for this order</i> 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** changes to **Submitted**, but can be changed.
- **Comments** - notes to be printed on the order form. This is useful if the order is mailed, e-mailed or faxed.
- **Invoice Paid** - indicates the invoice has been paid. Enter additional information in the **Payment Reference** field.
- **Notes** - additional information related to the order that does not need to be printed on the form.
- **Sales Tax** and/or **Shipping/Handling** costs - enter the amounts. The **Total** for the order 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




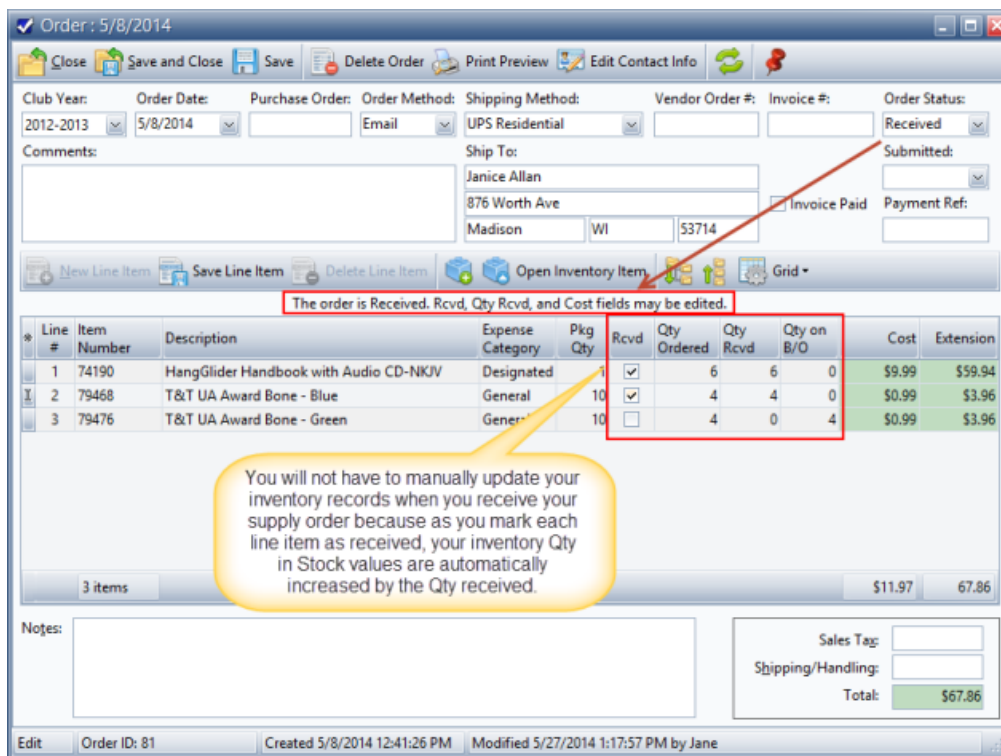
The line item grid behaves differently depending on the **Order Status** value as follows:

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:

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|-------------|---------------------------|--|
| | New Line Item | <p>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.</p> <p> 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.</p> <p> 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.</p> |
| | 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.



The screenshot shows the 'Order: 5/8/2014' window. The 'Order Status' is set to 'Received'. A red box highlights the 'Rcvd' column in the grid, with a red arrow pointing to the 'Open Inventory Item' button. A callout box states: 'You will not have to manually update your inventory records when you receive your supply order because as you mark each line item as received, your inventory Qty in Stock values are automatically increased by the Qty received.'

| Line # | Item Number | Description | Expense Category | Pkg Qty | Rcvd | Qty Ordered | Qty Rcvd | Qty on B/O | Cost | Extension |
|--------|-------------|--|------------------|---------|-------------------------------------|-------------|----------|------------|--------|-----------|
| 1 | 74190 | HangGlider Handbook with Audio CD-NKJV | Designated | 10 | <input checked="" type="checkbox"/> | 6 | 6 | 0 | \$9.99 | \$59.94 |
| 2 | 79468 | T&T UA Award Bone - Blue | General | 10 | <input checked="" type="checkbox"/> | 4 | 4 | 0 | \$0.99 | \$3.96 |
| 3 | 79476 | T&T UA Award Bone - Green | General | 10 | <input type="checkbox"/> | 4 | 0 | 4 | \$0.99 | \$3.96 |

Summary: 3 items, Total: \$11.97, 67.86

Notes: [Empty field]

Sales Tag: [Empty field]
Shipping/Handling: [Empty field]
Total: \$67.86

Order ID: 81 | Created 5/8/2014 12:41:26 PM | Modified 5/27/2014 1:17:57 PM by Jane

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".)


If not using the Expense Category feature, go to [Admin > Options > Inventory and Ordering](#). Clear the check box for "**When adding new line items to an Order, display the Expense Category columns and populate it with the default value as set in the related inventory record**".

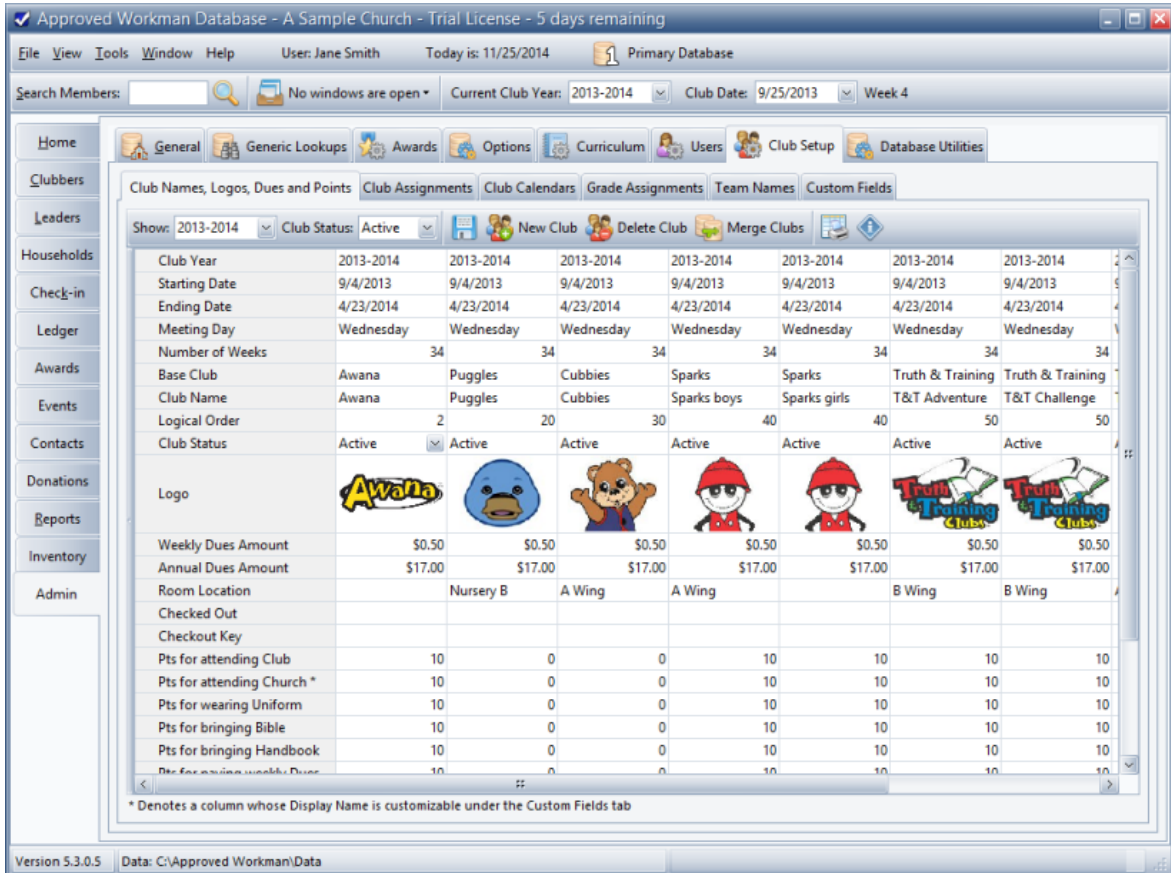
Chapter








19

19 The Admin Module

Since there are many ways to run an Awana Program, there are many ways to customize AWdb. The Admin Module provides lots of customizing options. Be sure to explore each tab!


 When using [Check-out/Check-in](#), all tabs are not shown in a Secondary Database. Also, only "Admin" [users](#) will see all the tabs. Non-Admin users will only have access to some [Database Utilities](#).



| Club Year | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 |
|----------------------------|--|--|--|---|--|--|--|
| Starting Date | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 |
| Ending Date | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 |
| Meeting Day | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday |
| Number of Weeks | 34 | 34 | 34 | 34 | 34 | 34 | 34 |
| Base Club | Awana | Puggles | Cubbies | Sparks | Sparks | Truth & Training | Truth & Training |
| Club Name | Awana | Puggles | Cubbies | Sparks boys | Sparks girls | T&T Adventure | T&T Challenge |
| Logical Order | 2 | 20 | 30 | 40 | 40 | 50 | 50 |
| Club Status | Active | Active | Active | Active | Active | Active | Active |
| Logo |  |  |  |  |  |  |  |
| Weekly Dues Amount | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 |
| Annual Dues Amount | \$17.00 | \$17.00 | \$17.00 | \$17.00 | \$17.00 | \$17.00 | \$17.00 |
| Room Location | | Nursery B | A Wing | A Wing | | B Wing | B Wing |
| Checked Out | | | | | | | |
| Checkout Key | | | | | | | |
| Pts for attending Club | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for attending Church * | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for wearing Uniform | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for bringing Bible | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for bringing Handbook | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for paying weekly Dues | 10 | 0 | 0 | 10 | 10 | 10 | 10 |

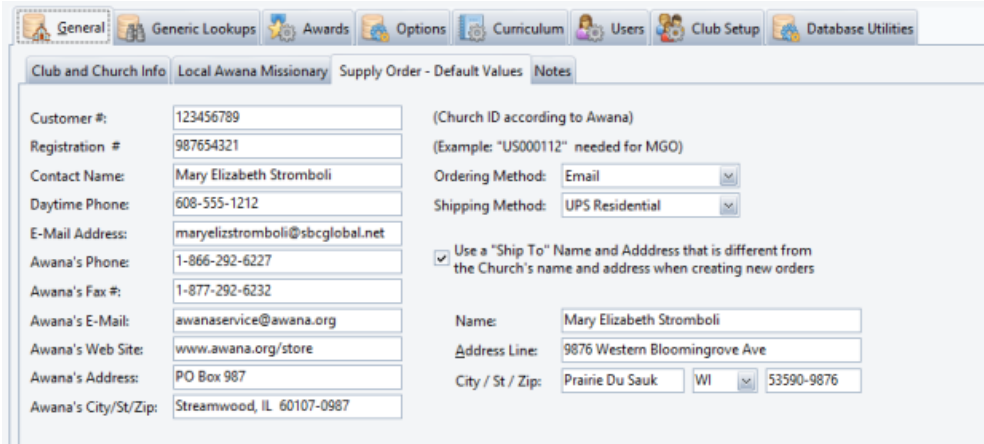
- [General](#) - pages for Club and Church Info, Local Awana Missionary, Supply Orders and Notes
- [Generic Lookups](#) - custom values used in many drop-down lists throughout the application
- [Awards](#) - settings for Book, Attendance, Event, Leadership Service and Journey Pin award triggers
- [Options](#) - customizable settings that affect how the database works in a variety of situations
- [Curriculum](#) - details for all [generic handbooks](#) including specific Section Group Awards; includes the [Set Point Values](#) utility used to globally modify handbook section point values
- [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, Notes and Responsibilities for each week can be set under the Club Calendars tab.
- [Database Utilities](#) - tools for managing the database

19.1 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.

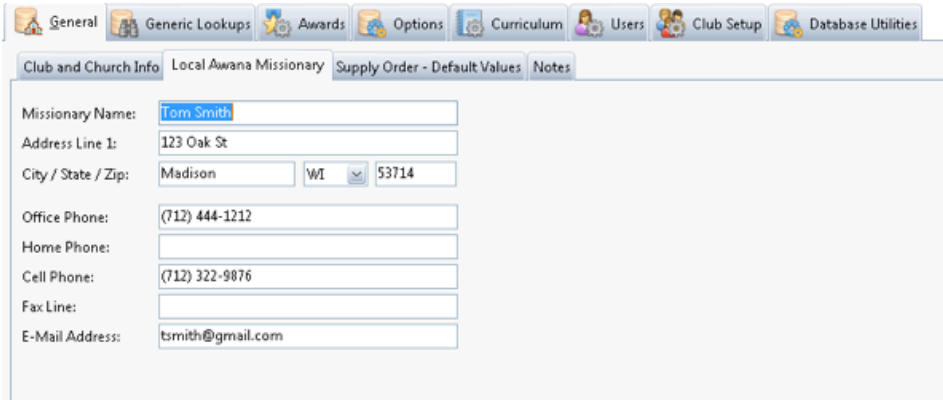


The screenshot shows the 'Club and Church Info' tab with the following fields:

| | | |
|----------------------|---------------------------------|--|
| Customer #: | 123456789 | (Church ID according to Awana) |
| Registration # | 987654321 | (Example: "US000112" needed for MGO) |
| Contact Name: | Mary Elizabeth Stromboli | Ordering Method: Email |
| Daytime Phone: | 608-555-1212 | Shipping Method: UPS Residential |
| E-Mail Address: | maryelizstromboli@sbcglobal.net | <input checked="" type="checkbox"/> Use a "Ship To" Name and Address that is different from the Church's name and address when creating new orders |
| Awana's Phone: | 1-866-292-6227 | Name: Mary Elizabeth Stromboli |
| Awana's Fax #: | 1-877-292-6232 | Address Line: 9876 Western Bloomingrove Ave |
| Awana's E-Mail: | awanaservice@awana.org | City / St / Zip: Prairie Du Sauk WI 53590-9876 |
| Awana's Web Site: | www.awana.org/store | |
| Awana's Address: | PO Box 987 | |
| Awana's City/ST/Zip: | Streamwood, IL 60107-0987 | |

Local Awana Missionary

The Awana Missionary information is for reference.



The screenshot shows the 'Local Awana Missionary' tab with the following fields:

| | |
|---------------------|------------------|
| Missionary Name: | Tom Smith |
| Address Line 1: | 123 Oak St |
| City / State / Zip: | Madison WI 53714 |
| Office Phone: | (712) 444-1212 |
| Home Phone: | |
| Cell Phone: | (712) 322-9876 |
| Fax Line: | |
| E-Mail Address: | tsmith@gmail.com |


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.


19.2 Generic Lookups

 The Generic Lookups tab contains a list of categories of drop-down lists used throughout AWdb. 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.

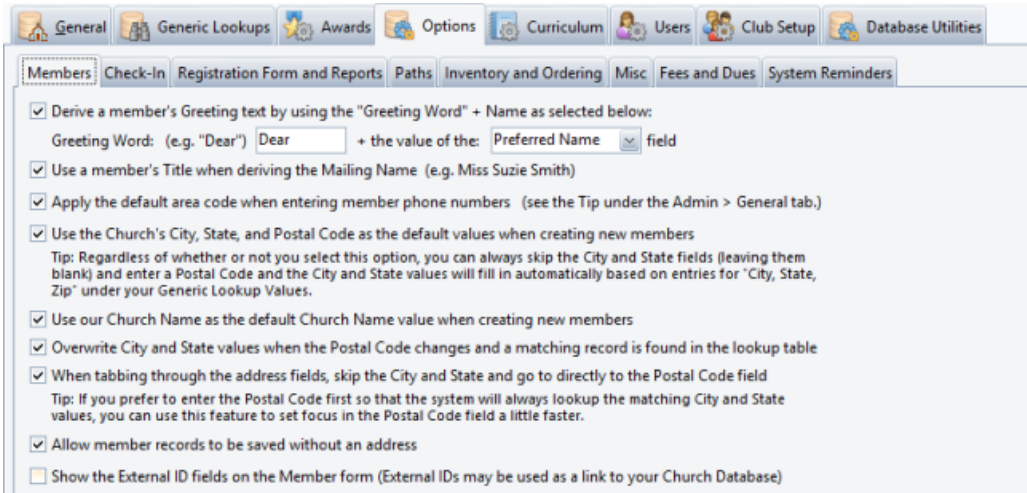
19.3 Options

 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](#).

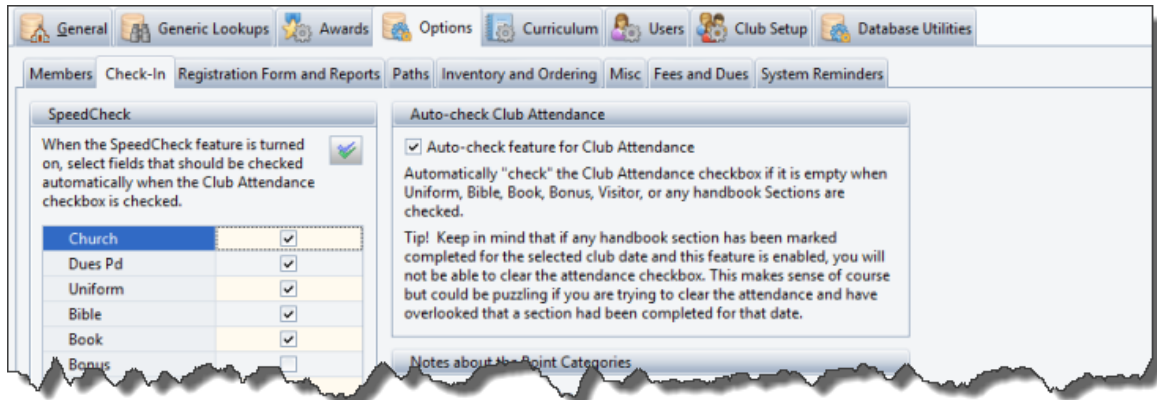


The screenshot shows the 'Options' tab selected in the Admin Module. The 'Members' sub-tab is active, displaying several configuration options:

- Derive a member's Greeting text by using the "Greeting Word" + Name as selected below:
Greeting Word: (e.g. "Dear") Dear + the value of the: Preferred Name field
- Use a member's Title when deriving the Mailing Name (e.g. Miss Suzie Smith)
- Apply the default area code when entering member phone numbers (see the Tip under the Admin > General tab.)
- Use the Church's City, State, and Postal Code as the default values when creating new members
Tip: Regardless of whether or not you select this option, you can always skip the City and State fields (leaving them blank) and enter a Postal Code and the City and State values will fill in automatically based on entries for "City, State, Zip" under your Generic Lookup Values.
- Use our Church Name as the default Church Name value when creating new members
- Overwrite City and State values when the Postal Code changes and a matching record is found in the lookup table
- When tabbing through the address fields, skip the City and State and go to directly to the Postal Code field
Tip: If you prefer to enter the Postal Code first so that the system will always lookup the matching City and State values, you can use this feature to set focus in the Postal Code field a little faster.
- Allow member records to be saved without an address
- Show the External ID fields on the Member form (External IDs may be used as a link to your Church Database)

Check-in

This tab provides options that deal with the [Check-in Module](#).



The screenshot shows the 'Check-in' sub-tab selected in the Admin Module. It features two main sections:

- SpeedCheck:** A section with a checkbox for 'When the SpeedCheck feature is turned on, select fields that should be checked automatically when the Club Attendance checkbox is checked.' Below this is a table:

| | |
|---------|-------------------------------------|
| Church | <input checked="" type="checkbox"/> |
| Dues Pd | <input checked="" type="checkbox"/> |
| Uniform | <input checked="" type="checkbox"/> |
| Bible | <input checked="" type="checkbox"/> |
| Book | <input checked="" type="checkbox"/> |
| Bonus | <input type="checkbox"/> |
- Auto-check Club Attendance:** A section with a checkbox for 'Auto-check feature for Club Attendance'. Below it is a tip: 'Automatically "check" the Club Attendance checkbox if it is empty when Uniform, Bible, Book, Bonus, Visitor, or any handbook Sections are checked. Tip! Keep in mind that if any handbook section has been marked completed for the selected club date and this feature is enabled, you will not be able to clear the attendance checkbox. This makes sense of course but could be puzzling if you are trying to clear the attendance and have overlooked that a section had been completed for that date.'

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.

Terms and Conditions

This tab provides customization of the text in the Terms and Conditions section of either the Clubbers or Leaders Registration Form.

The screenshot shows the 'Terms and Conditions' tab selected. The 'Form Type' is set to 'Clubbers'. The 'Terms and Conditions' section contains two paragraphs of text. A tip indicates that the font can be changed using MS Word.

Form Type: Clubbers Leaders

Terms and Conditions

Tip: If you want to change the font, you can use MS

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 medical attention for my child/children.

Instructions and Background Check

This tab allows personalization of the instructions or background check notices to be included.

The screenshot shows the 'Instructions and Background Check' tab selected. The 'Form Type' is set to 'Clubbers'. The 'Instructions' section contains two text boxes for customizing instructions for pre-filled and blank forms. The 'Background Check Notice' section contains a text box for customizing the notice.

Form Type: Clubbers Leaders

Instructions:

Text entered in this field (up to 3 lines) will appear at the top of the PRE-FILLED Registration form and would typically be used for a welcome followed by instructions for making corrections to the data contained in the pre-filled form:

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.

Text entered in this field (up to 3 lines) will appear at the top of the BLANK Registration form and would typically be used for a welcome followed by instructions for completing the form.

Please complete and sign this form. You may use the back side if you require more space. If you grant permission for us to send text messages, please provide your Cell Phone Carrier's Name here: _____ (e.g. AT&T, Verizon, etc.)

Interested in Helping and Background Check Notice:

Office Use

This tab allows customization of the office-related information to include on the Registration Form.

The screenshot shows the 'Office Use' tab selected. The 'Form Type' is set to 'Clubbers'. The 'Office Use' section contains a text box for customizing the office use information and a 'Fees' section with input fields for Dues, Book, and Uniform.

Form Type: Clubbers Leaders

Office Use

This section appears in the lower right corner of the Registration Form. You may choose to use this area to keep track of amounts owed and list the cost of various items such as handbooks and uniforms. It may also be the area where you indicate payments

Fees:

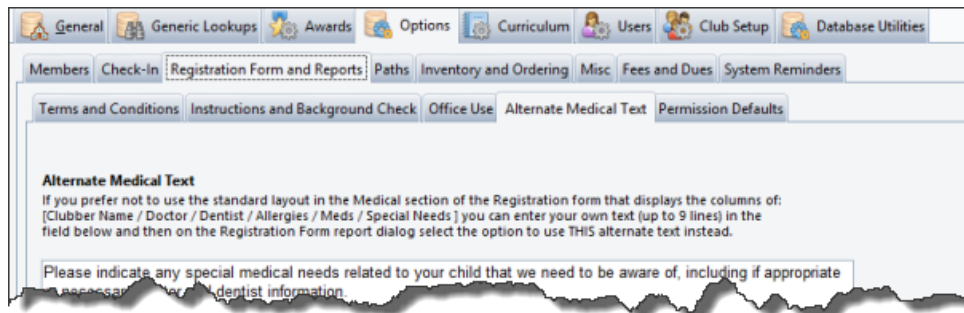
Dues _____

Book _____

Uniform _____

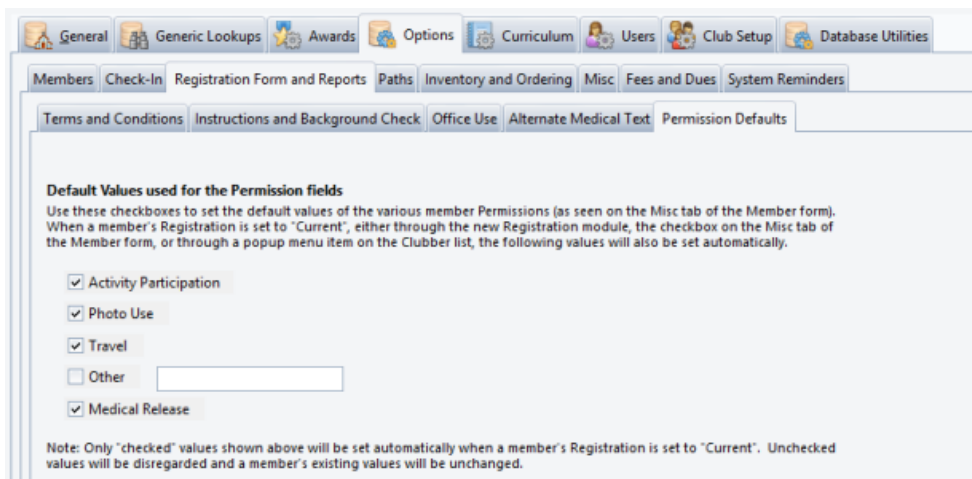
Alternate Medical Text

This tab provides the option to use a customized alternate text on the Clubber Registration Form.



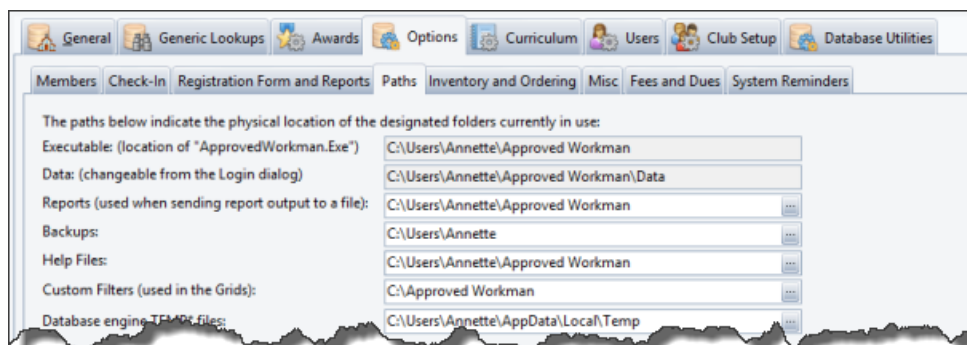
Permission Defaults

This tab allows selection of which permission fields to update (on the Member form's [Misc.](#) tab) when the registration is set to 'current'.



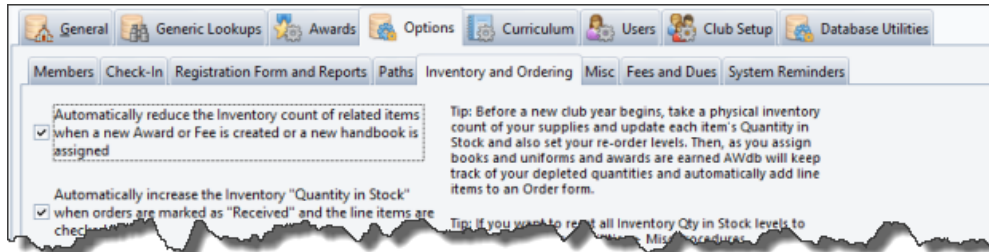
Paths

This tab allows modification to the data paths for storing various files.



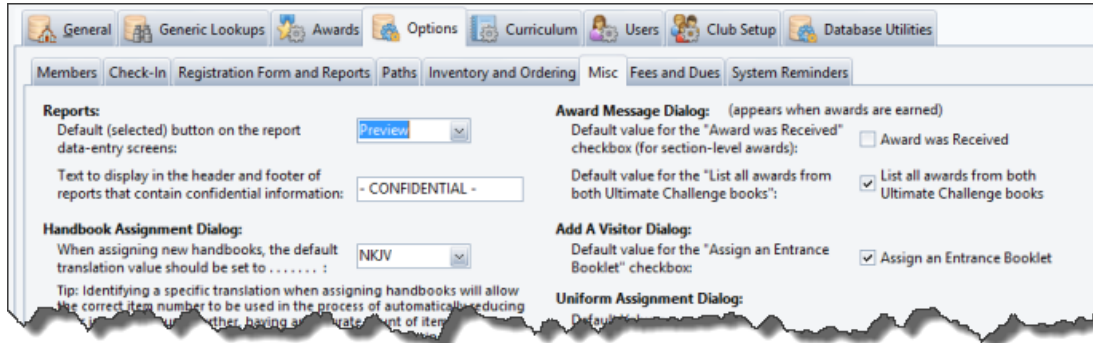
Inventory and Ordering

This tab provides options related to the Inventory Module. See [Inventory Tracking](#) for more details.



Misc

This tab includes various options that were not included in the other tabs.

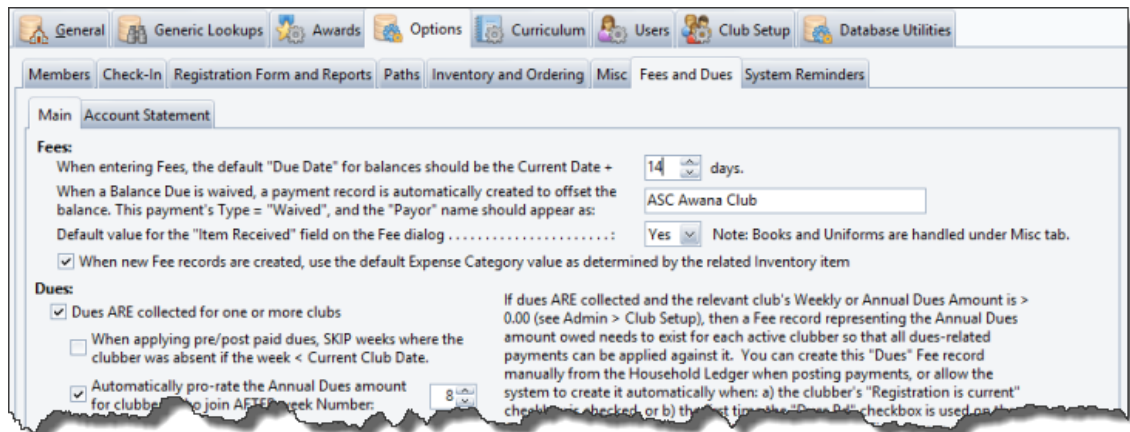


Fees and Dues

This tab contains two sub-tabs:

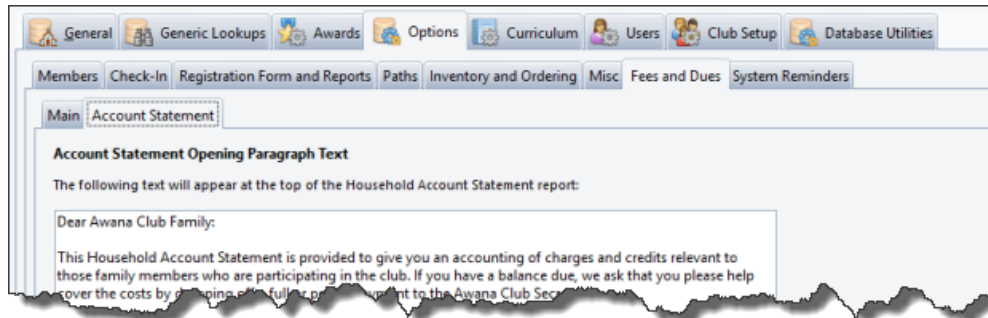
Main

This tab provides options related to fees and dues.



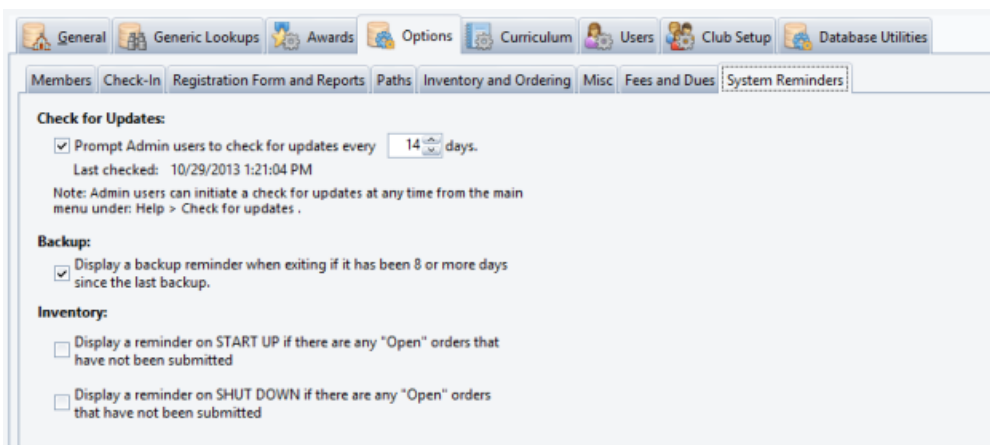
Account Statement

This tab allows customization of the text used at the top of the [Household Account Statement](#).



System Reminders

This tab provides options for controlling the reminder dialogs that appear during startup and shutdown.



19.4 Awards



The Awards tab includes award triggers for handbook completion, by attendance or event participation, and Journey Pin requirements. By staying current with the support plan and applying all of the AWdb updates as well as using awards offered by Awana Clubs International, these should not 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.

Book Awards | Attendance Awards | Event Awards | Leadership Service Awards | Journey Pin Awards

Some Book Awards are associated to a specific book, while others are based on the number of books completed while in the same club (i.e. Cubbies). Clubbers in grades 3 through 12 participate in Awana's Cumulative Book Award System (Excellence, Challenge, Timothy, etc).

Book-specific Awards for all grades | Cumulative Book Awards for grades Pre-2 | Cumulative Book Awards for grades 3-12

| Base Club Name | Book Name | Awards Specific to the Selected Book | Item # | Effective | Expiration |
|-------------------|---------------------------|--------------------------------------|--------|-----------|------------|
| Awana | Apple Acres Booklet (Yr1) | Click here to add a new row | | | |
| Puggles | Apple Acres Booklet (Yr2) | Click here to add a new row | | | |
| Children | AppleSeed | AppleSeed Book Award | 93880 | 8/1/2013 | 12/31/2030 |
| Cubbies | Bear Hug Brochure (Yr1) | Click here to add a new row | | | |
| Sparks | Bear Hug Brochure (Yr2) | Click here to add a new row | | | |
| Truth & Training | Bible ABC's | Click here to add a new row | | | |
| JV | Bible Bees | Click here to add a new row | | | |
| Journey | Character Builder 1 | Click here to add a new row | | | |
| Youth | Character Builder 2 | Click here to add a new row | | | |
| TeamKID | HoneyComb | Click here to add a new row | | | |
| TeamKID Preschool | | Click here to add a new row | | | |
| TeamKID Younger | | Click here to add a new row | | | |
| TeamKID Older | | Click here to add a new row | | | |

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.

Book Awards | Attendance Awards | Event Awards | Leadership Service Awards | Journey Pin Awards

Some Book Awards are associated to a specific book, while others are based on the number of books completed while in the same club (i.e. Cubbies). Clubbers in grades 3 through 12 participate in Awana's Cumulative Book Award System (Excellence, Challenge, Timothy, etc).

Book-specific Awards for all grades | Cumulative Book Awards for grades Pre-2 | Cumulative Book Awards for grades 3-12

When the member's Base Club Name is:

| When the member's Base Club Name is: | ... and the # of qualifying books is: | ... then the Award(s) would be: | | | |
|--------------------------------------|---------------------------------------|---------------------------------|-------|----------|------------|
| Truth & Training | 1 | Click here to add a new row | | | |
| Trek | 2 | Click here to add a new row | | | |
| JV | 3 | Third Book Award | 57621 | 1/1/1950 | 6/30/2010 |
| Journey | 4 | Click here to add a new row | | | |
| Youth | 5 | Click here to add a new row | | | |
| | 6 | Click here to add a new row | | | |
| | 7 | Challenge Award and Pin | 79572 | 7/1/2010 | 12/31/2020 |
| | 8 | Click here to add a new row | | | |
| | 9 | Click here to add a new row | | | |
| | 10 | Click here to add a new row | | | |

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.

Select which clubs to include in the calculations for Club and Church Attendance Awards. After attendance has been recorded for the last week in each Quarter, you will need to run the procedure that will generate the Attendance Award records. From the main menu, select Tools > Attendance Awards.

Note: The 1st Semester includes the dates in the 1st and 2nd Quarters. The 2nd Semester includes the dates in the 3rd and 4th Quarters. (The specific dates within a given Quarter are accessible under the Admin > Club Setup > Club Calendars tab.)

| Base Club | Include | Term | Absences Allowed Per Term | Award Name | Award Item # |
|------------------|-------------------------------------|----------|---------------------------|------------------------------|--------------|
| Awana | <input type="checkbox"/> | Quarter | 1 | | |
| Cubbies | <input type="checkbox"/> | Semester | 2 | | |
| JV | <input type="checkbox"/> | Quarter | 1 | | |
| Journey | <input type="checkbox"/> | Quarter | 1 | | |
| Nursery | <input type="checkbox"/> | Quarter | 1 | | |
| Sparks | <input checked="" type="checkbox"/> | Quarter | 1 | Achievement Jewel - Blue | 83069 |
| Truth & Training | <input checked="" type="checkbox"/> | Quarter | 1 | T&T Club Attendance Stickers | 48881 |
| Trek | <input type="checkbox"/> | Quarter | 1 | | |
| Puggles | <input type="checkbox"/> | Quarter | 1 | | |

- Check the box next to each **Base Club** to **Include** it in the calculations for Attendance Awards.
- Set the **Term** to either Quarter or Semester.
- Set the number of **Absences Allowed Per Term**.
- Select an **Award Name** from the drop-down list. The **Award Item #** will be filled automatically.
- Clubs can be added or removed by using the buttons below the grid.

Event Awards


This tab manages awards earned for participate in an event. The Event Names are determined by [Generic Lookups > Events](#). Select an event, then use the grid on the right to add, modify, or remove associated awards. The awards appear as options in the [Event dialog](#) when using the Event Module.

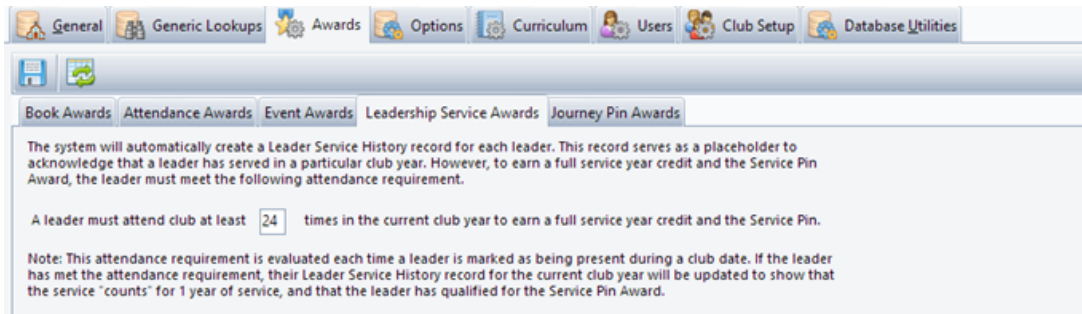
Use this page to establish Awards related to Events you have created under the Events category of the Generic Lookups tab. Select the Event from the list on the left and then add or edit related Awards. Note: When creating Event records for individual Members, you will be able to select the awards that are applicable to the member. Tips: You can clear a dropdown list item with Alt+Backspace. If you do not see the Award Name you are looking for, remember that a corresponding Inventory Item record must exist and be designated as an item that should appear as a choice in any Award list boxes.

| Event Name | Award Name | Item # | Sort Order | Default |
|---------------------------|---|--------|------------|-------------------------------------|
| Grand Prix | Click here to add a new row | | | |
| Journey AwanaGames | Blue AwanaGames Participation Patch | 83627 | | <input checked="" type="checkbox"/> |
| Journey Quizzing | Green AwanaGames Participation Patch | 83635 | | <input type="checkbox"/> |
| Leadership Basic Training | Red AwanaGames Participation Patch | 83619 | | <input type="checkbox"/> |
| Sparks-A-Rama | T&T Bronze First Place Medal - AwanaGames | 51713 | | <input type="checkbox"/> |
| T&T AwanaGames | T&T Fourth Place Ribbon - AwanaGames | 52193 | | <input type="checkbox"/> |
| T&T Quizzing | T&T Second Place Ribbon - AwanaGames | 52177 | | <input type="checkbox"/> |
| Trek AwanaGames | T&T Third Place Ribbon - AwanaGames | 52185 | | <input type="checkbox"/> |
| Trek Quizzing | Yellow AwanaGames Participation Patch | 83643 | | <input type="checkbox"/> |

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.



The screenshot shows the 'Leadership Service Awards' tab selected. The interface includes a menu bar with options: General, Generic Lookups, Awards, Options, Curriculum, Users, Club Setup, and Database Utilities. Below the menu, there are sub-tabs: Book Awards, Attendance Awards, Event Awards, Leadership Service Awards (selected), and Journey Pin Awards. The main content area contains the following text:


The system will automatically create a Leader Service History record for each leader. This record serves as a placeholder to acknowledge that a leader has served in a particular club year. However, to earn a full service year credit and the Service Pin Award, the leader must meet the following attendance requirement.

A leader must attend club at least times in the current club year to earn a full service year credit and the Service Pin.

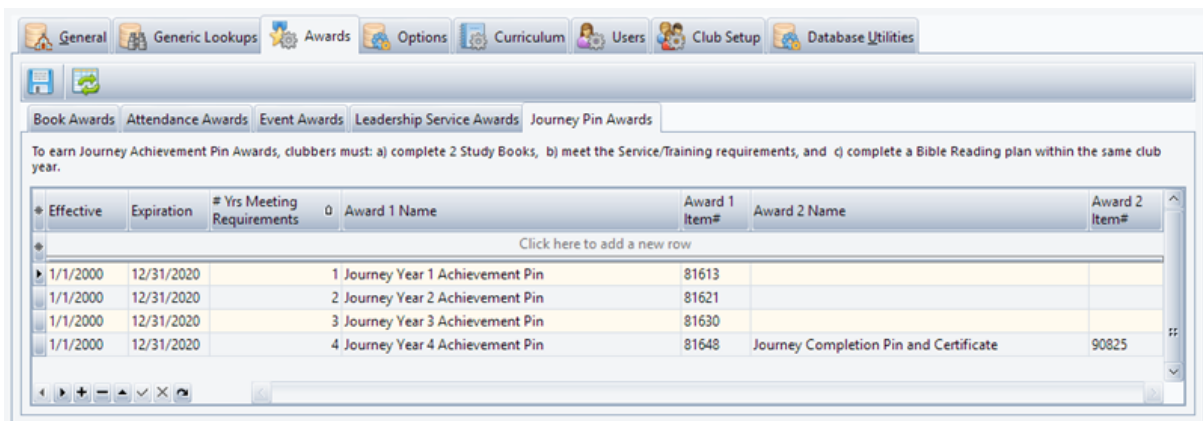
Note: This attendance requirement is evaluated each time a leader is marked as being present during a club date. If the leader has met the attendance requirement, their Leader Service History record for the current club year will be updated to show that the service "counts" for 1 year of service, and that the leader has qualified 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. AWdb 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.






The screenshot shows the 'Journey Pin Awards' tab selected. The interface includes a menu bar with options: General, Generic Lookups, Awards, Options, Curriculum, Users, Club Setup, and Database Utilities. Below the menu, there are sub-tabs: Book Awards, Attendance Awards, Event Awards, Leadership Service Awards, and Journey Pin Awards (selected). The main content area contains the following text:


To earn Journey Achievement Pin Awards, clubbers must: a) complete 2 Study Books, b) meet the Service/Training requirements, and c) complete a Bible Reading plan within the same club year.

| Effective | Expiration | # Yrs Meeting Requirements | Award 1 Name | Award 1 Item# | Award 2 Name | Award 2 Item# |
|-----------------------------|------------|----------------------------|--------------------------------|---------------|--|---------------|
| Click here to add a new row | | | | | | |
| 1/1/2000 | 12/31/2020 | 1 | Journey Year 1 Achievement Pin | 81613 | | |
| 1/1/2000 | 12/31/2020 | 2 | Journey Year 2 Achievement Pin | 81621 | | |
| 1/1/2000 | 12/31/2020 | 3 | Journey Year 3 Achievement Pin | 81630 | | |
| 1/1/2000 | 12/31/2020 | 4 | Journey Year 4 Achievement Pin | 81648 | Journey Completion Pin and Certificate | 90825 |

19.5 Curriculum

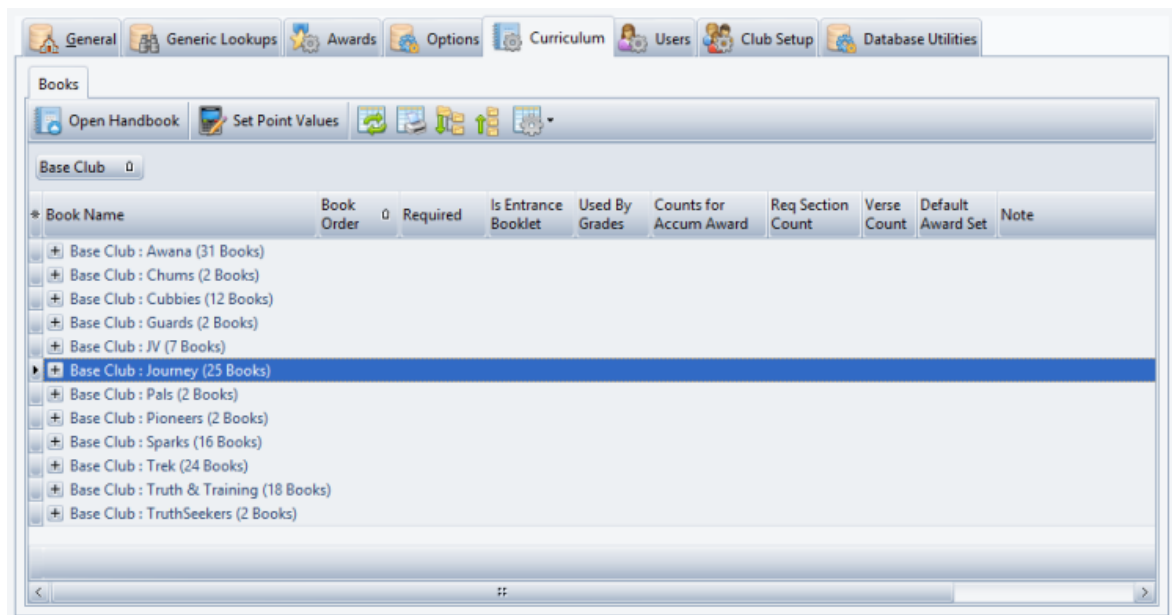
 The Curriculum tab displays the handbooks and other forms of curricula used in Awana. Besides the normal [grid manipulations](#), there are two buttons available on the toolbar:

| | | |
|---|-------------------------|---|
|  | Open Handbook | Opens the Generic Handbook Window to view or modify information about the selected generic handbook. |
|  | Set Point Values | Opens the Section Point Values Dialog to set the default point values for sections within selected handbooks. |

 While the Section Point Values dialog allows modifying all of the point values for an entire book's required and/or extra credit sections, to modify individual section point values in a handbook, use the Handbook window.

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](#).



19.5.1 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 three tabs, as described below.

General Book Information

Handbook Name: HangGlider

Base Club Name: Sparks

| Translation | Item Number | In Use |
|-------------|-------------|-------------------------------------|
| ESV | 92988 | <input type="checkbox"/> |
| KJV | 74173 | <input type="checkbox"/> |
| NIV | 74211 | <input type="checkbox"/> |
| NKJV | 74190 | <input checked="" type="checkbox"/> |

Handbook Assignment Dialog Note: << Type a note here that will help users make the correct selection when assigning books.

This is an Entrance Booklet

Counts toward the Cumulative Book Awards (Excellence, Timothy, etc.)

Required Book: Yes << Meaning it is not an extra credit workbook

of Required Sections: 40

Used by Grades: K,1,2

Verse Count: 35

| Book Name | Order | Required |
|---------------------------|-------|----------|
| God Loves Me | 0 | No |
| God Made Me | 0 | No |
| Gate Test Booklet | 1 | Yes |
| Skipper Handbook | 2 | Yes |
| Skipper Workbook | 3 | No |
| Hiker Handbook | 4 | Yes |
| Hiker Workbook | 5 | No |
| Climber Handbook | 6 | Yes |
| Climber Workbook | 7 | No |
| Flight 3:16 | 8 | Yes |
| HangGlider | 9 | Yes |
| HangGlider Frequent Flyer | 10 | No |

Browse Book_ID: 210 Section_ID: 2612 Modified 8/12/2008 9:32:29 AM by Jane


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.
- **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
- **Required Book** - indicates whether or not the book is required.
- **Used by Grades** - tracks which grades use this book.
- **Verse Count** - shows the number of verses included in the required sections of the handbook.
- **Base Club Name** - the PRIMARY base club that uses the book.
- **Base Clubs Using this Book** - all base clubs currently using the book.

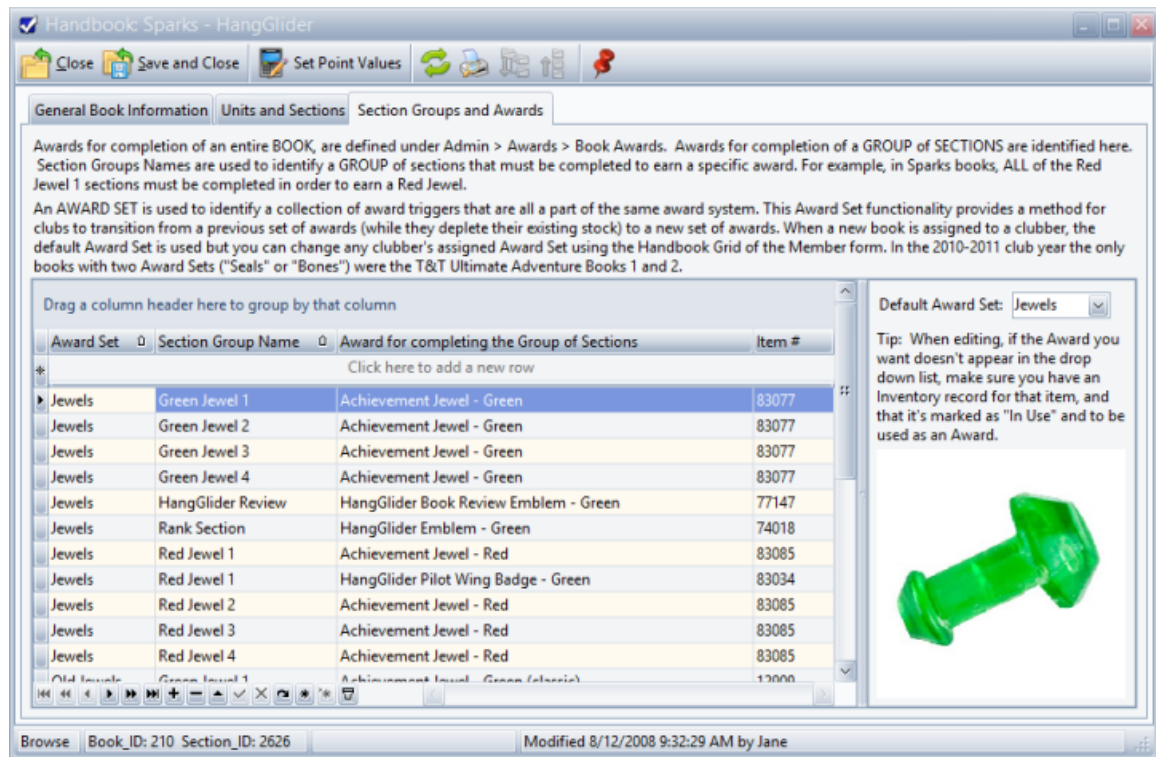
Units and Sections

| Unit Name | Sect Num | Sect Ord | Section Name | Req | Points | Group Name | 1st Award for completing the Single Section |
|--------------------|----------|----------|------------------------|-----|--------|-------------------|---|
| + Unit : 1 | | | | | | | |
| + Unit : 2 | | | | | | | |
| - Unit : 3 | | | | | | | |
| Red Jewel 3 | 1 | 1 | Red Jewel 3:1 | Yes | 10 | Red Jewel 3 | |
| Red Jewel 3 | 2 | 2 | Red Jewel 3:2 | Yes | 10 | Red Jewel 3 | |
| Red Jewel 3 | 3 | 3 | Red Jewel 3:3 | Yes | 10 | Red Jewel 3 | |
| Red Jewel 3 | 4 | 4 | Red Jewel 3:4 | Yes | 10 | Red Jewel 3 | |
| Green Jewel 3 | 1 | 5 | Green Jewel 3:1 | Yes | 10 | Green Jewel 3 | |
| Green Jewel 3 | 2 | 6 | Green Jewel 3:2 | Yes | 10 | Green Jewel 3 | |
| Green Jewel 3 | 3 | 7 | Green Jewel 3:3 | Yes | 10 | Green Jewel 3 | |
| Green Jewel 3 | 4 | 8 | Green Jewel 3:4 | Yes | 10 | Green Jewel 3 | |
| Green Jewel 3 Revi | 1 | 10 | Green Jewel 3:1 Review | No | 10 | HangGlider Review | |
| + Unit : 4 | | | | | | | |

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.
- **Points** - value to be awarded when the single section is completed. The maximum point value for any one section is 100. Keep in mind that the [Set Point Values](#) utility will overwrite individually customized point values.
- **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 AWdb 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.

Section Groups and Awards



The **Section Groups and Awards** tab includes a grid containing the records used to trigger awards. Under the **Units and Sections** tab, each handbook section has 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.

19.5.2 Section Point Values Dialog

To set the default point values for sections within selected handbooks, click the **Set Point Values** button on the [Admin > Curriculum](#) toolbar to open the Section Point Values dialog. It is best to set the handbook section point values before the start of a new club year, but this utility can be run mid-year and assigned handbooks will be updated. This will affect the total points already earned by all clubbers who have completed sections, so there might be some explaining to do when the point values change!

This utility allows you to set the default point values for all sections of the selected generic handbooks*

Step 1 - Select the generic handbooks to update

| Select | Book Name | Req | Obsolete |
|-------------------------------------|----------------------|-----|----------|
| + | Base_Club : JV | | |
| + | Base_Club : Journey | | |
| + | Base_Club : Pals | | |
| + | Base_Club : Pioneers | | |
| - | Base_Club : Sparks | | |
| <input type="checkbox"/> | Climber Handbook | Yes | False |
| <input type="checkbox"/> | Flight 3-16 | Yes | False |
| <input type="checkbox"/> | Gate Test Booklet | Yes | True |
| <input checked="" type="checkbox"/> | HangGlider | Yes | False |
| <input type="checkbox"/> | Hiker Handbook | Yes | False |
| <input type="checkbox"/> | Skipper Handbook | Yes | True |
| <input type="checkbox"/> | SkyStormer | Yes | False |
| <input type="checkbox"/> | WingRunner | Yes | False |
| <input type="checkbox"/> | Climber Workbook | No | False |
| <input type="checkbox"/> | God Loves Me | No | False |
| <input type="checkbox"/> | God Made Me | No | False |

Step 2 - Set the point values

Update the Required Sections: Set the Point Values to: 15

Update the Extra Credit Sections: Set the Point Values to: 25

Note: The point value for any single section in any generic handbook may also be edited by opening the individual handbook record and editing the records under the Units and Sections tab.

Step 3 - Select a synchronization option

All Sections* All section records whether completed or not, will be updated, even those from prior club years

Some Sections* All incomplete sections, as well as those completed from: 8/4/2010 to: 4/27/2011

IMPORTANT: This procedure updates the point values in the Generic Handbook Sections (the records used as a template when assigning a book). The sections for handbooks already assigned will be updated based on the Synchronization option you select. Consider this option carefully before running the procedure.

* The Total Point values on the Check-in screen will be affected by these changes. After running this utility, you will be prompted to run the utility that recalculates all points for all members. Be sure to run it.

* Generic Handbooks and Sections are those that are used as a template when assigning a book to a member


0% Run Close

Step 1 – Select the generic handbooks to update

This grid displays all the Awana curricula. Click the '+' (plus) button to expand a base club and view its handbooks. Check the box next to all handbooks to include in updating the section point values.

Step 2 – Set the point values

Use the check boxes to indicate which group of sections (**Required** and/or **Review/Extra Credit** Sections) to modify. Adjust the **Point Values** as desired for each. The maximum point value for any one handbook section is 100.


-  All Required Sections will have the same point values within a handbook, just as all Extra Credit Sections will have the same point values. To set the point value for a particular section of a generic handbook, use the **Open Handbook** button on the [Admin > Curriculum](#) toolbar. Then, under the **Units and Sections** tab, edit the individual section point values. Keep in mind though, that running the **Set Point Values** utility shown above will overwrite any individually customized section point values.

Step 3 – Select a synchronization option

Besides updating the point values in the Generic Handbook Sections (the records used as a template when assigning a book), this utility will update the sections for the handbooks already assigned depending on the selected options:

- **All Sections** - All section records, whether completed or not, will be updated, including those from prior club years.
- **Some Sections** - All incomplete sections, as well as those completed within the date range you provide, will be updated.

Click **Run**. The point values will be updated in the generic handbook records, and in all existing assigned handbooks as selected in Step 3.

-  Since the section points have been modified, the Total Points earned by each clubber needs to be recalculated. After running this utility, a prompt will be given to run the [Point Recalculation utility](#) in order to recalculate all points for all members. Be sure to run it!

19.6 Users



The Users tab manages the names and account information of those authorized to use AWdb. The first admin user is created during the [Purge Sample Data](#) 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.



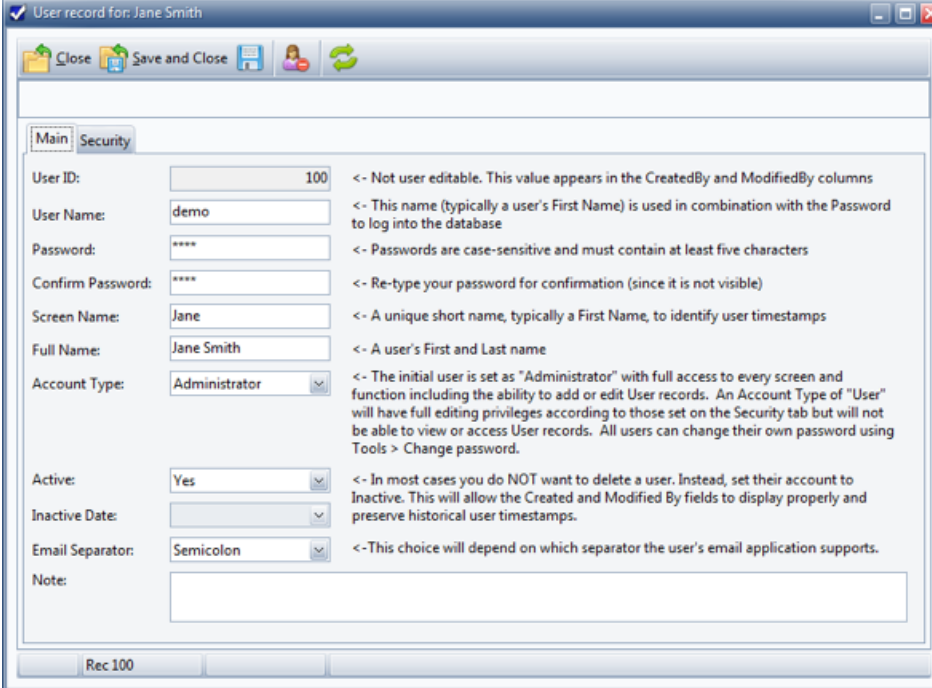
Do NOT use generic user accounts that are shared by more than one person. Otherwise, users could overwrite other user's settings and grid layouts. You will also lose valuable information related to creation and modification of records.

| User ID | Screen Name | Full Name | Active | Account Type | Logged In | Last Login | Last Logout | Modified |
|---------|---------------|---------------|--------|---------------|-------------------------------------|------------------------|----------------------|----------------------|
| 100 | J Smith | Jane Smith | Yes | Administrator | <input checked="" type="checkbox"/> | 8/15/2011 3:06:48 PM | 8/12/2011 8:41:17 PM | 11/20/2004 8:16:28 A |
| 104 | P Jones | Percy Jones | Yes | Administrator | <input type="checkbox"/> | 11/17/2006 11:23:08 AM | 6/7/2010 5:56:29 PM | 8/28/2005 8:00:48 A |
| 110 | Mary Dolittle | Mary Dolittle | Yes | User | <input type="checkbox"/> | | | 9/17/2010 11:23:11 A |

| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|-------------|-----------------------------|---|
| | 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 screenshot shows a window titled "User record for: Jane Smith" with a toolbar containing icons for Close, Save and Close, Print, Help, and Refresh. The window has two tabs: "Main" (selected) and "Security". The "Main" tab contains the following fields and their values:

- User ID: 100
- User Name: demo
- Password: ****
- Confirm Password: ****
- Screen Name: Jane
- Full Name: Jane Smith
- Account Type: Administrator
- Active: Yes
- Inactive Date: (empty)
- Email Separator: Semicolon
- Note: (empty text area)

Each field has a corresponding help text to its right:

- User ID: <- Not user editable. This value appears in the CreatedBy and ModifiedBy columns
- User Name: <- This name (typically a user's First Name) is used in combination with the Password to log into the database
- Password: <- Passwords are case-sensitive and must contain at least five characters
- Confirm Password: <- Re-type your password for confirmation (since it is not visible)
- Screen Name: <- A unique short name, typically a First Name, to identify user timestamps
- Full Name: <- A user's First and Last name
- Account Type: <- The initial user is set as "Administrator" with full access to every screen and function including the ability to add or edit User records. An Account Type of "User" will have full editing privileges according to those set on the Security tab but will not be able to view or access User records. All users can change their own password using Tools > Change password.
- Active: <- In most cases you do NOT want to delete a user. Instead, set their account to Inactive. This will allow the Created and Modified By fields to display properly and preserve historical user timestamps.
- Email Separator: <- This choice will depend on which separator the user's email application supports.

At the bottom of the window, there is a status bar showing "Rec 100".

The following fields are shown on the Main tab:

- **User ID** - a system assigned ID. This is a read-only field.
- **User 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.
- **Screen Name** - unique short name, usually a user's First Name.
- **Full Name** - user's First Name and Last Name.
- **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.
- **Active** - indicates the status of the user account. If a user no longer needs access to the database, instead of deleting the account, set the active status to "no" (inactive).

- **Inactive Date** - date the account became inactive.
- **E-mail 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.
- **Note** - any additional information or notes related to the user account.

19.7 Club Setup



To begin 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.

| General Generic Lookups Awards Options Curriculum Users Club Setup Database Utilities | | | | | | | | |
|---|-----------|-----------|-----------|-------------|--------------|------------------|------------------|-----------|
| Club Names, Logos, Dues and Points Club Assignments Club Calendars Grade Assignments Team Names Custom Fields | | | | | | | | |
| Show: 2013-2014 Club Status: Active New Club Delete Club Merge Clubs | | | | | | | | |
| Club Year | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 | 2013-2014 |
| Starting Date | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 | 9/4/2013 |
| Ending Date | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 | 4/23/2014 |
| Meeting Day | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday | Wednesday |
| Number of Weeks | 34 | 34 | 34 | 34 | 34 | 34 | 34 | 34 |
| Base Club | Awana | Puggles | Cubbies | Sparks | Sparks | Truth & Training | Truth & Training | |
| Club Name | Awana | Puggles | Cubbies | Sparks boys | Sparks girls | T&T Adventure | T&T Challenge | |
| Logical Order | 2 | 20 | 30 | 40 | 40 | 50 | 50 | |
| Club Status | Active | Active | Active | Active | Active | Active | Active | |
| Logo | | | | | | | | |
| Weekly Dues Amount | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | \$0.50 | |
| Annual Dues Amount | \$17.00 | \$17.00 | \$17.00 | \$17.00 | \$17.00 | \$17.00 | \$17.00 | |
| Room Location | | Nursery B | A Wing | A Wing | | B Wing | B Wing | |
| Checked Out | | | | | | | | |
| Checkout Key | | | | | | | | |
| Pts for attending Club | | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for attending Church * | | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for wearing Uniform | | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for bringing Bible | | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for bringing Handbook | | 10 | 0 | 0 | 10 | 10 | 10 | 10 |
| Pts for bringing weekly Dues | | 10 | 0 | 0 | 10 | 10 | 10 | 10 |

* Denotes a column whose Display Name is customizable under the Custom Fields tab

- 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.)
- **Club Status** - Use the drop-down menu to change the default setting of "Active" to "Inactive". If it is decided to not offer a certain club after running the NYS, inactivate it. (Or select the club's entire column and click the **Delete Club** button.)
- **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**, or earning a **Bonus** as well as the two Custom fields - values credited to a member when the various items are marked (on the [Check-in grid](#) or the [Attendance](#) tab of the Member record).



Set the Display Names for Custom Fields on the **Custom Fields** tab (also under Club Setup).



The maximum value of Total Points is 32,000 so keep point values modest (1-50)!



[Set Point Values](#) for handbook sections under **Admin > Curriculum**.

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 **Themes, Notes, and Responsibilities**
- **Create a new set of dates:** enter **Starting / Ending** dates and **dates to be excluded**.
- **Delete Club** - Removes the selected club.



In order to preserve historical accuracy, do not delete a club that was used in prior club years.



A club's status can be set to **Inactive** in order to keep it from appearing in various drop-down lists.

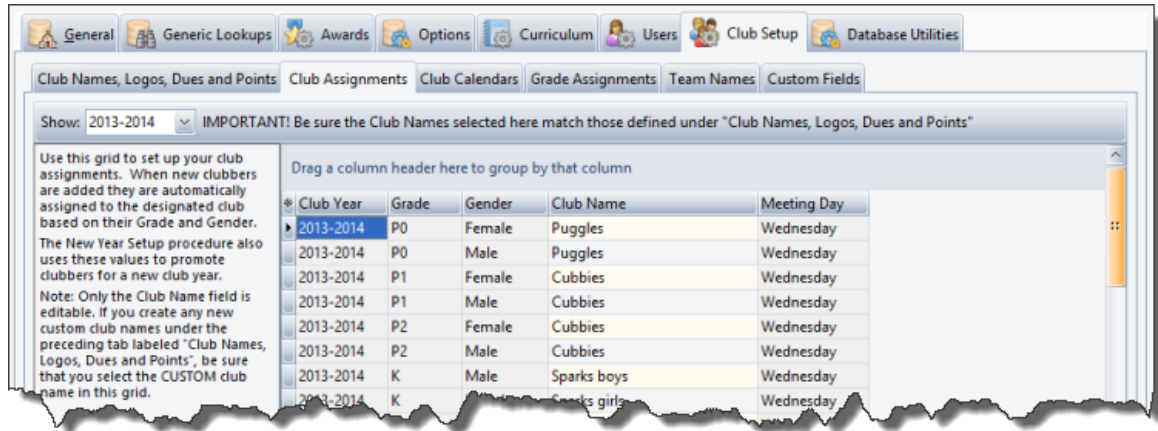
- **Merge Clubs** - Merges the members from one club into another club. Use this mid-year to combine two clubs like "T&T Boys" and "T&T Girls" into a single club named "T&T".



In order to proceed with the merge, both clubs must be of the same Base Club and must be using the same session dates (club calendars). Only records in the Current Club Year will be affected.

Club Assignments

This tab shows the records AWdb 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.



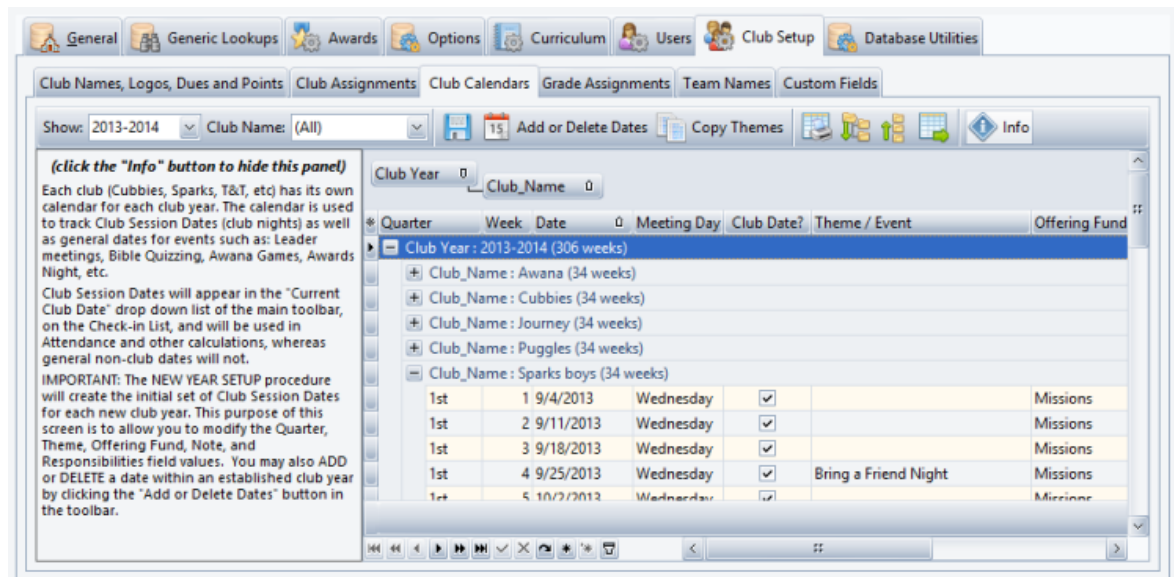
- If a gender or grade has been incorrectly associated to a specific club, click the cell under the **Club Name** column and select the correct club name from a drop-down menu.



Only the **Club Name** field is editable on this page. For each new club name created under the **Club Names, Logos, Dues and Points** tab, be sure a **Club Name** on this page matches 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, and date** - of the session. The Quarter designation can be changed. 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**, **Responsibilities**, **Offering Fund**, and/or **non-club dates**, then choose a club or clubs to **update the records**.

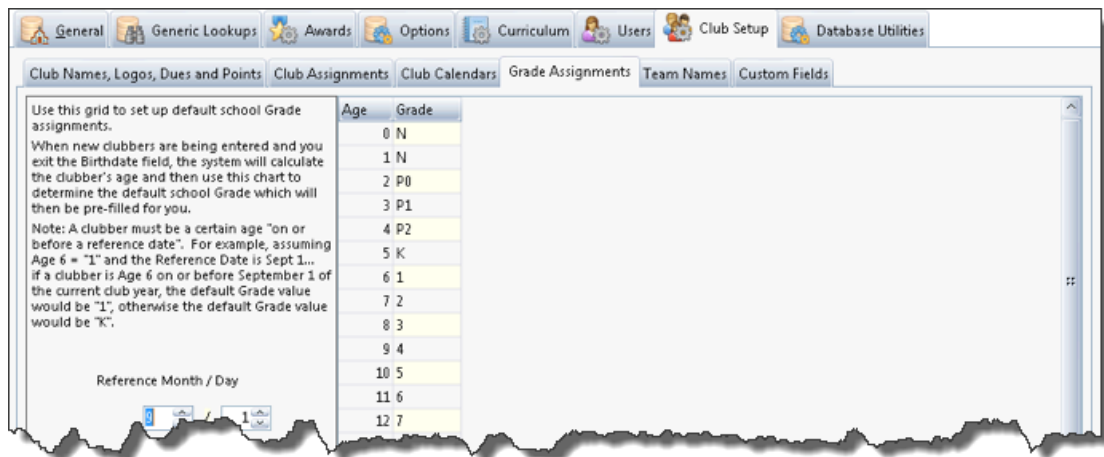


The Copy button is disabled until both club names are selected.

- **Responsibilities** - for leaders on a specific club date (such as a leader substituting for an absent leader or bringing cookies for a party).
- **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.

Grade Assignments

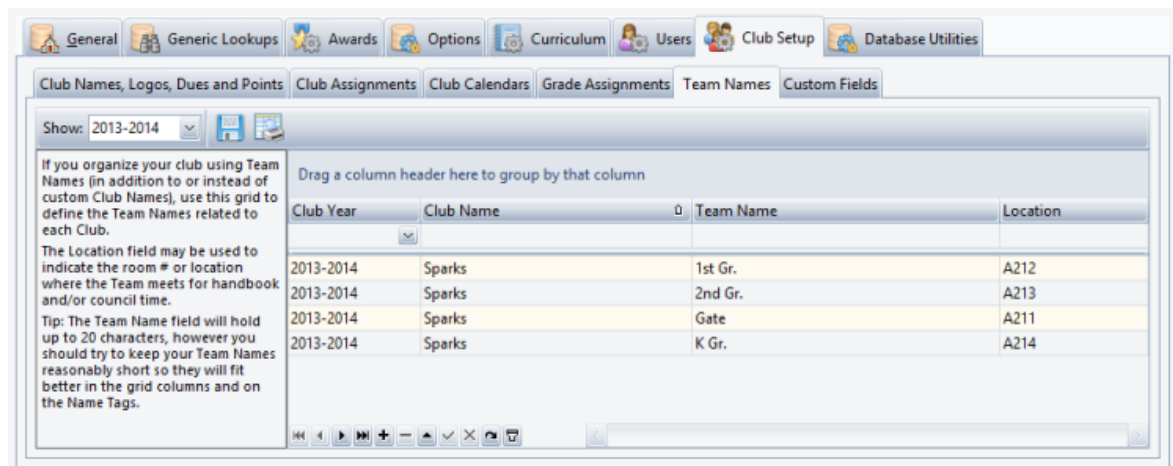
Use this page to assign default grades based on a clubber's age. The grade assignments are the defaults. A clubbers's grade can be changed on the member's record.



- **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

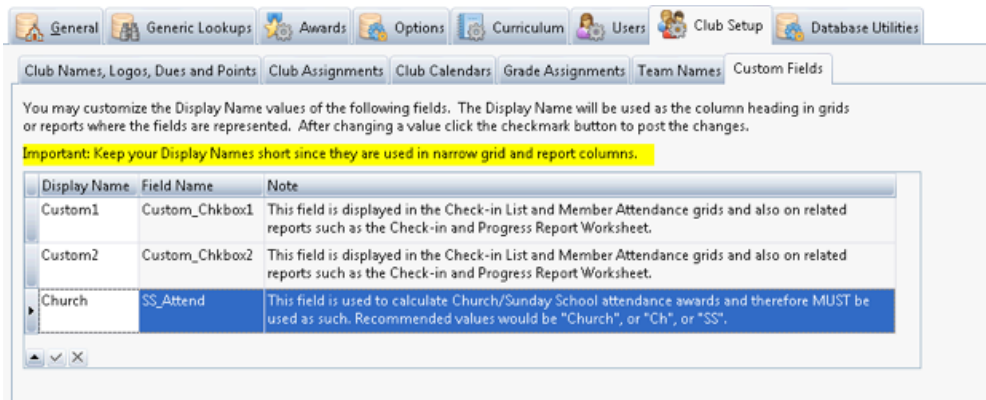
If your club is organized using team names (in addition to or instead of custom club names), use the **Team Names** page to define the team names related to each club.



- To add a Team: click on the empty row at the top of the grid or click '+' (**plus**) below the grid.
 1. **Club Year** - defaults to the current club year, but can be changed.
 2. **Club Name** - Awana club name associated with the team.
 3. **Team Name** - unique name to use for the team.
 4. **Location** - room # or location where the team meets (usually for handbook and/or council time).

Custom Fields

There are three 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.



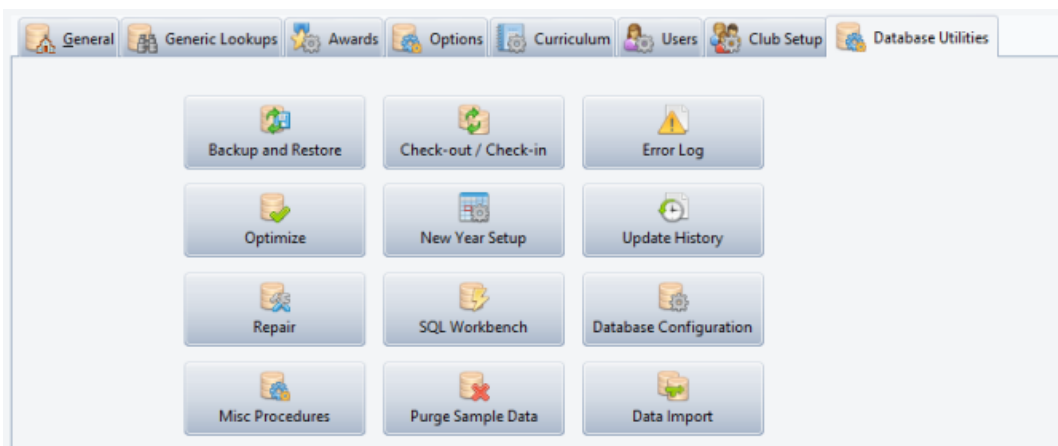
The fields labeled "Custom1" and "Custom2" can be defined specifically for your club. Keep the display names short since they are used in narrow grid and report columns. To assign the related point values, go to the **Club Names, Logos, Dues and Points** tab (also under **Club Setup**).

The field labeled "Church" is used to calculate Church or Sunday School attendance and **must** be used for this purpose; however, the **Display Name** can be changed.

19.8 Database Utilities



The various tools found on the Database Utilities page help maintain the data. To learn more about each utility, read the corresponding section.



19.8.1 Backup and Restore



These utilities protect your data so you won't lose everything if the computer crashes, the data is erased or corrupted, or any other unforeseen calamity occurs. Visit the [forum](#) to watch a video about the Backup and Restore utilities.

Backing up your Database

On the **Backup** tab, fill in the information required to create a single backup file. This file will have a .bcp extension and can only be opened with the AWdb Restore feature.

- **Backup Path** - automatically populates with a location to create the backup file, but can be modified using the ... button at the end of the field and navigating to a different location.



Make sure the backup path is not the same as the installed Approved Workman folder so the main database and the backup won't be confused. If the database is run from the local C: drive, select a USB flash drive or an external drive for the backup file. If the database is run directly from a USB flash drive, select the local C: drive or an external drive.

- **File Name** - automatically populates with a default name, but can be modified by typing in the field.



The current date will automatically be added to the file name.

- **Description** - notes that might be helpful when selecting backups to restore, such as "Backup before running New Year Setup."
- **Options** - choose to **include a copy of the current Approved Workman executable file**. Also choose to **exclude the Inventory Photo files** to create a smaller file. In general, accept the defaults unless instructed otherwise.

After reviewing the information, click **Start** to begin the backup utility. The window switches to the **Log** tab to show the progress. Click **Save the log...** if desired.

Restoring your Database

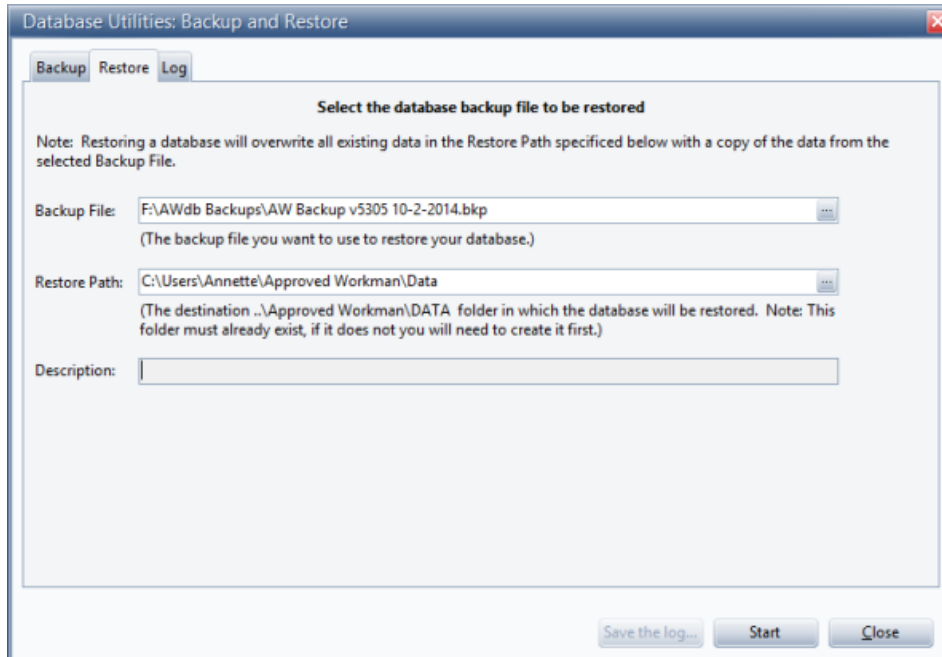
On the **Restore** tab, fill in the information required to restore data that was previously backed up using the AWdb Backup feature.



If file corruption prevents logging in to the database to access the **Restore** tab, it can be accessed from the [Utilities button](#) on the [Log-in Dialog](#).



Restoring a database will overwrite all existing data in the specified **Restore Path** with a copy of the data from the selected **Backup File**.



- **Backup File** - the AWdb backup file (ends in .bkp) to be restored. Either type in the name of the backup file, or use the ... button at the far right of the field to browse and find the file.
- **Restore Path** - defaults to "C:\ApprovedWorkman\Data." If the database is installed elsewhere, edit the field or use the ... button at the far right of the field to browse for a location. A different path can be used if you do not want to overwrite your existing data.



This folder **must** already exist. If it doesn't, create it before starting the Restore process.

- **Description** - If the Backup File is selected using the ... button, this field will show the description used when it was created. If no description was given, it will remain blank.

After reviewing the information, click **Start** to begin the restore utility. The window will automatically switch to the **Log** Tab to show the progress. Click **Save the log...** if desired.

After restoration is complete, a dialog will prompt you to restart the database. Click **OK** to close the database, then log back in as normal.

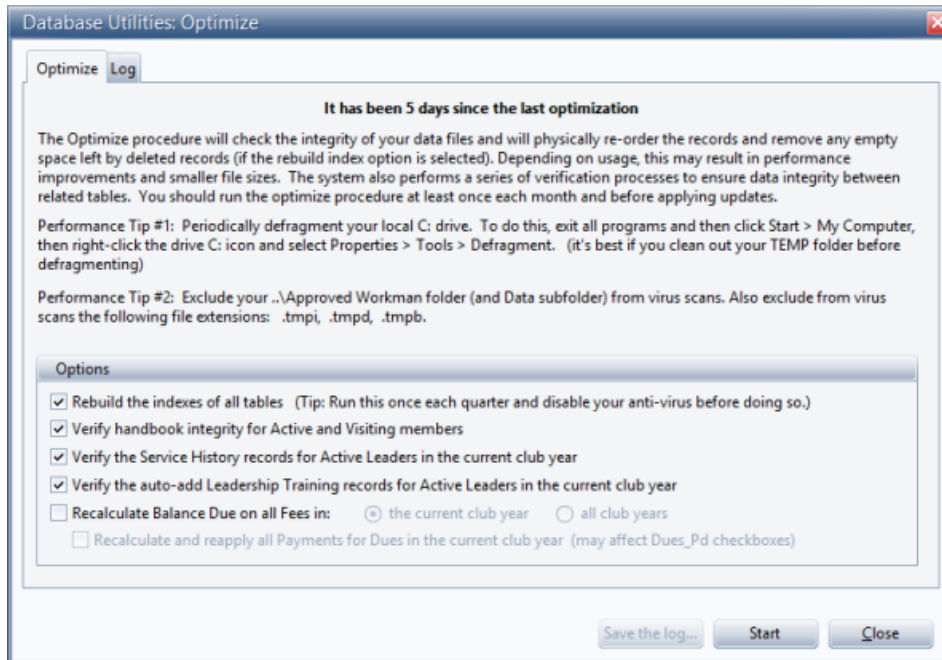
19.8.2 Optimize



Use this utility to make sure the data is organized correctly and that no redundant, void, or corrupted data exists in the database that might cause confusion or problems. It also performs a number of housekeeping tasks such as deleting old temp files and files that might have been left over from a prior update. It looks for potentially inaccurate club assignments and missing data and draws attention to these issues in the resulting log.



It is a good idea to run the Optimization once a month.

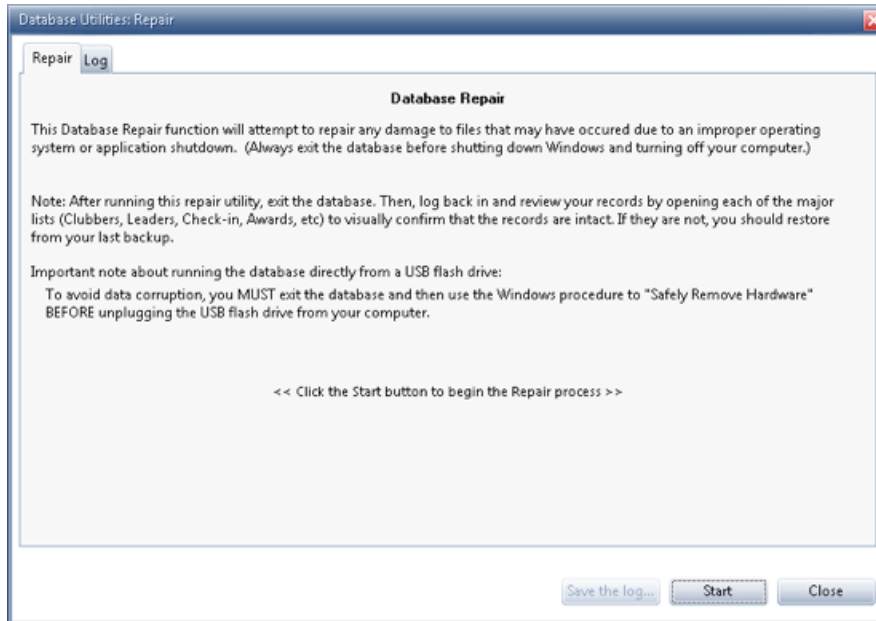


1. Read all the text on the **Optimize** tab to know exactly what this utility does.
2. Change selections for the additional options if desired. Typically the default settings are adequate.
3. Click **Start**. The utility goes through the database files and optimizes them. The **Log** Tab displays the optimization's progress.
4. When the optimization is complete, review the log. To save a log that contains recommendations, click the **Save the log...** button.

19.8.3 Repair



This utility attempts to repair any damage caused to files by malfunctions such as improper shutdowns of the application, or bugs and errors which occurred while running the application.

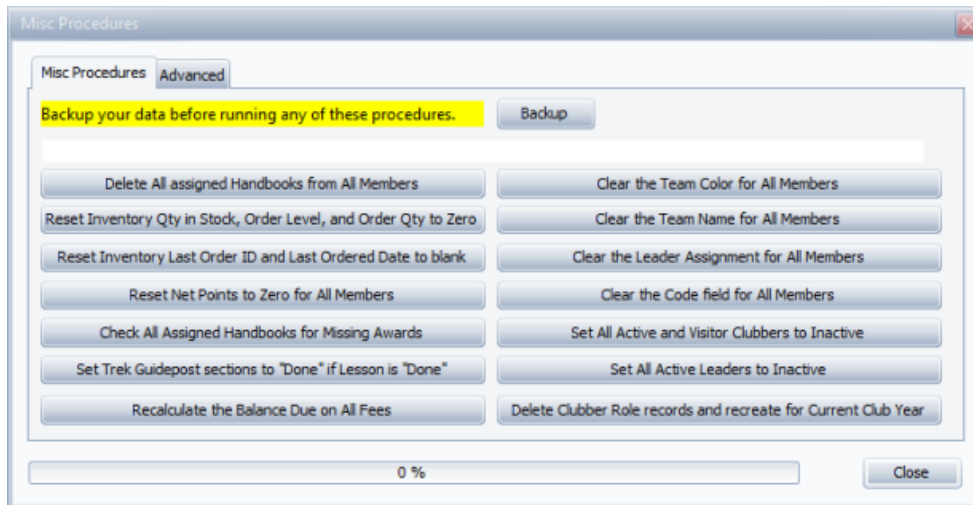


1. Read all the text on the **Repair** Tab before starting the utility.
2. Click **Start**. The utility attempts to repair any damaged database files. The **Log** Tab displays the repair's progress.
3. When the repair is complete, the log will remind you to immediately exit AWdb and then log in again to confirm that your data is intact. Click **Close**.
4. Exit AWdb by selecting **File > Exit** from the main menu.
5. Restart AWdb and log in.
6. Review the database records (especially the major modules such as Clubbers, Leaders, and Check-in) to confirm that the records are intact. If they are not, use the **Restore** utility to [restore your recent backup](#) of the database.

19.8.4 Misc Procedures



While not used often, the following Miscellaneous Procedures could occasionally be helpful.



Before running any of these procedures, [create a backup of the database](#). There is no way to undo the changes except to restore from a backup!



For any procedures that affect records for the Current Club Year, the Current Club Year can be changed prior to running the procedure by adjusting it in the Main Window's toolbar.

Delete All assigned Handbooks from All Members - also removes all related Awards.

Reset Inventory Qty in Stock, Order Level, and Order Qty to Zero - also sets the "Qty on Order", "Last Order Date" and "Last Order ID" to null.

Reset Inventory Last Order ID and Last Ordered Date to blank

Reset Net Points to Zero for All Members - each member's total net points are "spent". The database tracks the points spent for each week, so the expenditure will be counted on the Current Club Date when the procedure is run.

Check All Assigned Handbooks for Missing Awards [currently unavailable, contact [customer support](#)] - reviews all assigned handbooks for all members and confirms the existence of appropriate awards. (Missing awards could be due to a bug in a previous version or from entering books in "History" or "Speed" mode.) If awards are missing, they are created. At the end of the procedure, the log will show which awards, if any, were created.



Running this procedure will not create duplicate awards.



For best performance, temporarily disable any anti-virus software. Be advised, this procedure can take several minutes to run, depending on the number of clubbers and PC speed.

Set Trek Guidepost sections to "Done" if Lesson is "Done" - reviews all Billboard Series handbooks and sets the Guidepost sections as "Completed" if the related main lesson is completed (using the same completion date).

Recalculate the Balance Due on All Fees - recalculates the Balance Due on all Fee records for all Club Years, unlike the Admin > Database Utilities > Optimize procedure, which recalculates the Balance Due only for the Current Club Year. Use this if there are several Fees from a prior year that are displaying an inaccurate Balance Due and it isn't practical to edit them individually.

Clear the Team Color for All Members - affects each Member record and all Person Session records for the Current Club Year.

Clear the Team Name for All Members - affects each Member record and all Person Session records for the Current Club Year.

Clear the Leader Assignment for All Members - affects each Clubber record and all Person Session records for the Current Club Year.

Clear the Code field for All Members - sets each Member Record's Code to null.

Set All Active and Visitor Clubbers to Inactive - affects each Active and Visitor Clubber's record, along with the Person Session records for the Current Club Year.

Set All Active Leaders to Inactive - affects each Active Leader's record and all Person Session records for the Current Club Year.

Delete Clubber Role records and recreate for Current Club Year - fixes any blank Club Names (possibly resulting from a problem during the New Year Setup).



Leaders will not be affected.

Advanced Procedures - these should only be run if instructed to do so by Customer Support. For questions about these procedures, please [contact Customer Support](#).

19.8.5 Check-out / Check-in



This utility provides non-networked multi-user functionality to use AWdb in multiple places at the same time. For example, a T&T director could Check-out the T&T club to have those records on his computer for the night to mark attendance and sections for the T&T clubbers (this would be a Secondary Database). Meanwhile, someone else would use the Primary Database to mark attendance and sections for Cubbies and Sparks. At the end of the night, the T&T director would check the Secondary Database back into the Primary Database so the information is again all in one place.



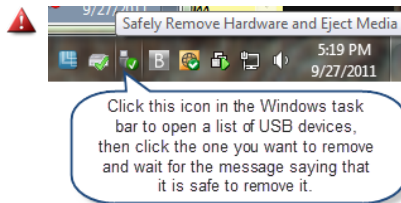
A multi-user license is required to use this feature.

How it works...

While logged in to the Primary database, select one or more clubs (or households) to be "checked out". In this example the "Sparks Boys and Sparks Girls" clubs will be checked out. The Primary database will replicate itself in a special way to create a Secondary database and then put all of the needed files in a newly created Approved Workman folder on a USB flash drive. At this point, all records in the Primary database that have been checked out (Sparks Boys and Sparks Girls) will be locked. They can still be viewed and reports run for those clubs, but they cannot be edited. In the Secondary database that is now on the USB flash drive, the opposite is true... all of the checked out records (Sparks Boys and Sparks Girls) are unlocked and fully editable, while all of the records that have not been checked out will be visible but locked, in a read-only state.

After using the proper technique to shut down the USB storage device, the USB flash drive can be given to another user who can plug it into any other computer (running Windows XP, Vista, 7, 8 or 10). They can then open the Approved Workman folder and launch and run AWdb directly from the USB flash drive.

They do not need to download any software or be connected to any network since all of the work will be done directly on the USB flash drive. They will have complete recordkeeping capabilities for the Sparks Boys and Sparks Girls clubs that has been checked out to them. At the same time, someone else can keep working in the Primary database, editing records for all of the clubs that are not checked out. At the end of club night, or whenever the USB flash drive is given back, check IN the Secondary database and all of the work that was done in it will be imported and synchronized back into the Primary database.



It is critical that a USB flash drive not be removed from the computer until it has been shut down properly; otherwise there is a serious risk of file corruption. Be sure to use the correct technique to tell Windows to shut down the USB drive, and then wait for the confirmation that it is safe to remove the device, BEFORE removing it from the computer.

Checking Out a Club

In the Primary Database, click **Admin > Database Utilities > Check-out/Check-in:**

Database Check-out / Check-in

Main Log

Step 1. If the computer's date of February 13, 2019, 03:13 PM is accurate, select a procedure: Check-In Check-Out

Step 2. Select the USB drive where the Secondary Database will be created: Req Space: 238 MB Free Space: 81191 MB

Step 3. Select records based on: Clubs Existing Groups Households

Secondary Databases Currently Checked Out:

There are no Secondary Databases checked out.

- Your license permits up to 9 Secondary databases to be checked out from this Primary database.


- An unlocked group available for check-out
- A locked group already checked out *
- A group matching the key, available for check in

* To reset a locked group, right-click its name in the grid


Step 4. Click "Run" to begin the check-out procedure

0%

1. Check the computer's Date & Time, then select **Check-out**.
2. Select the USB drive letter where the Secondary Database will be created - use the drop-down list to navigate to the drive. It must be different than the drive letter of the Primary database.


 This document always speaks of and assumes users are using USB flash memory drives. Technically however, any USB external drive would work.


3. Select records based on: **Clubs, Existing Groups** or **Households**.


 Checking out records based on Households can be useful for registration to process information for families with members in multiple clubs.

4. Complete selection details: select the club name(s), groups or alphabet letters.

- For selection by Club, optionally specify which **Team Colors to Include** and/or which **Team Names to include**. Choose to **Exclude Archived Member Records for faster processing** (recommended) and to **Exclude clubbers who are LITs in the selected club(s)**.

 **Secondary Database Name** - read-only field shows the name that will be used under the Existing Groups tab for quick access when creating secondary databases in the future.

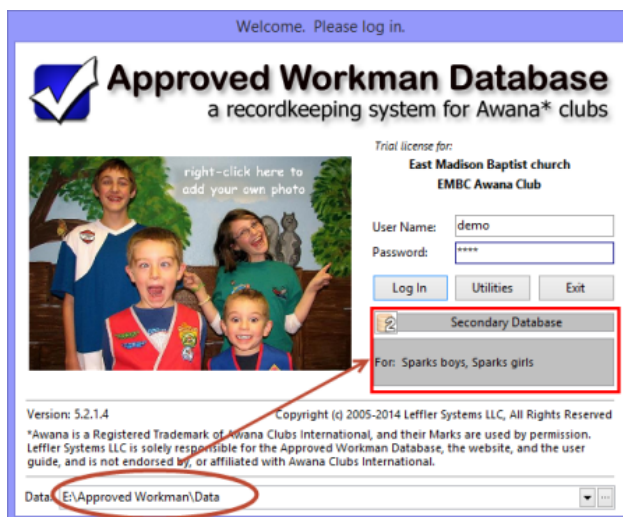
- For selection by group or alphabet, an open padlock  indicates a group available to check out.

5. Click **"Run"**. The window switches to the **Log** tab and displays the progress. Choose to **Print** or **Save the log** if desired. A confirmation dialog indicates which groups were successfully checked out. Checked out groups will have a closed padlock  indicating that it is locked in the Primary Database and no longer available to check out.

6. Use the proper technique (as described above) to safely shutdown and remove the USB flash drive containing the Secondary Database.

Starting the Secondary Database from the USB flash drive

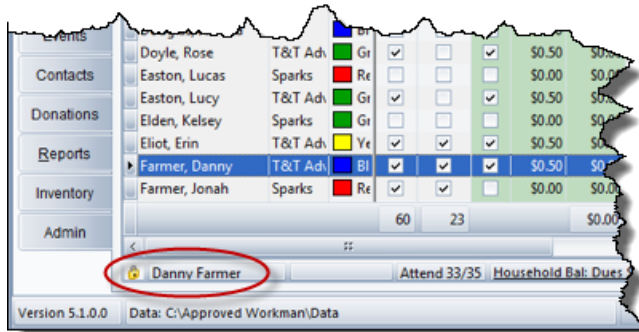
Insert the USB drive with the Secondary database into a computer. Usually a dialog appears showing the drive letter that was assigned. From here, select the choice of viewing folders and files on the device. If this dialog does not appear, click **Start > Computer** and double click the icon representing the USB flash drive to see its folders and files. Open the Approved Workman folder on the USB drive and double click the ApprovedWorkman.exe file to launch the Secondary database. The log-in screen will open, but with a few changes.



Notice that the Data path is correctly pointing to the USB flash drive letter. Also the words "Secondary Database" are displayed and the checked out clubs are listed.


Locked Records

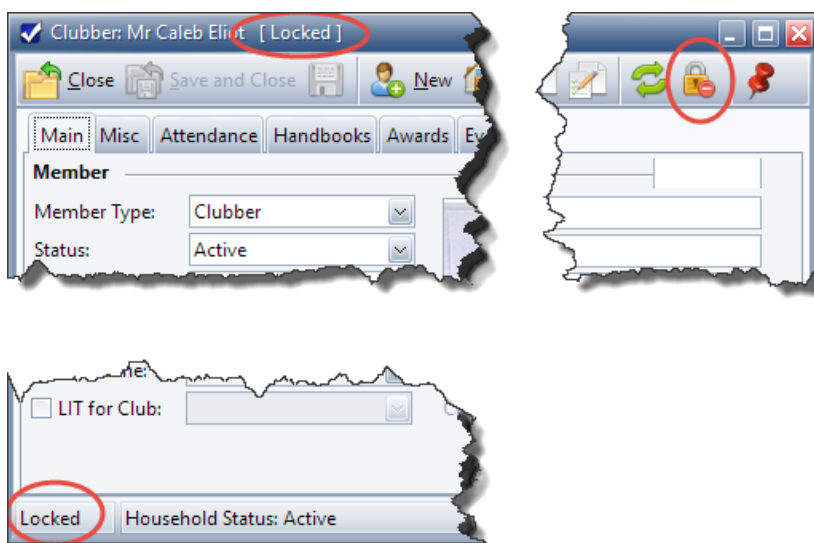
The Check-in module has an indicator to show whether or not a member's record is locked. The most obvious way to tell is by attempting to check the attendance box and nothing happens. That might seem confusing at first, but the status bar will show a closed padlock symbol.



If a locked member record is opened, "Locked" is shown in the title bar and in the status bar. An **Unlock** button is also added to the toolbar of locked member records.

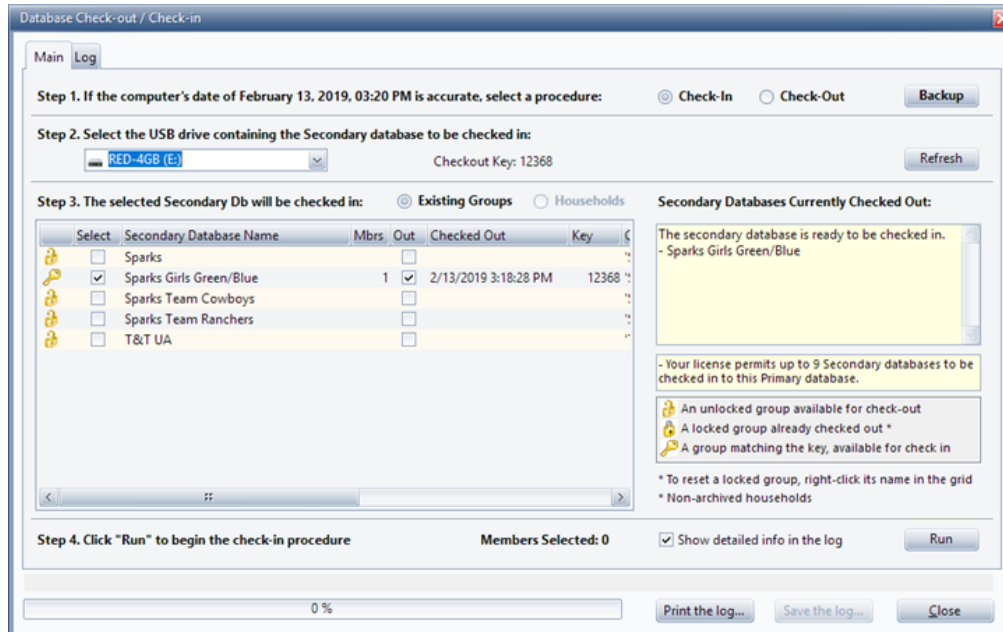
The **Unlock** feature provides a way to override the lock for situations where a clubber is locked (in either the primary or a secondary database) but the person with the database having the locked record should have 'ownership' of the record. (For example, a visitor who has previously attended but whose record is archived, so is not available - locked - in a secondary database.) It is not intended to be used to make changes to a locked record that is known to be in active use in another database. The person who has 'ownership' of the record should make those changes. The best way to know if the unlock feature should be used is to consider "should I have ownership of this record or does the person who currently has the unlocked record need to keep ownership?"


 If a locked record in a primary database is unlocked using this feature, any changes made in the secondary database will NOT be checked in. Likewise, if a locked record in a secondary database is unlocked using this feature, the record WILL be checked in (over-writing any changes made in the primary database).



Checking a Secondary Database back into the Primary

Log in to the Primary Database and click **Admin > Database Utilities > Check-out / Check-in**. On the Database Check-out/Check-in dialog's **Main** tab, follow these steps:



1. Check the computer's Date & Time, then select **Check-in**.
2. Select the USB drive containing the Secondary Database to be checked in: If only one Secondary Database is checked-out, the correct drive letter will likely already be selected. If it is not, select the correct drive letter from the drop-down list of drives.
3. The selected club(s) or groups will be checked in - a club or group available for Check-in will be indicated by a key symbol  next to it and will automatically be selected.



When multiple groups are checked-out, all of them do not need to be checked in at once.

4. Click **"Run"**. The Database Check-out / Check-in dialog switches to the **Log** tab and display the progress of the check-in. Any data that was added or modified in the Secondary Database will be transferred into the Primary Database. (Records that were deleted in the Secondary database will also be deleted from the Primary.) **Print** or **Save the log** if desired.

Data entry Exceptions:

Generally, a user in the Primary database can't make any changes to members who are in checked out groups. There are a some exceptions, however:

- Household data - such as: Address, Persons authorized to pick up clubbers, Phones and E-mails that are shared by all members of a household. Primary and/or Secondary database users can change these fields if they have at least one member editable in the household.
- Payments - a user in either database can post payments to any fees in the Household Ledger.
- NEW members - can be entered in either database regardless of the club assignment.

What Happens if the USB flash drive with the Secondary Database is lost?

In the Primary Database, click **Admin > Database Utilities > Check-out/Check-in**. On the **Main** tab:

1. Check the computer's Date & Time, then select **Check-In**.
2. In the Step 3 grid, right click on the club that needs to be checked-in to open the pop-up menu.
3. Click **Reset all records in the selected club as being Checked In**. A dialog will ask for confirmation to mark these records as "checked in" without running the check-in procedure. Click **Yes**. This will unlock the records that were previously checked out.



Once a group is reset, it cannot be checked in later if the lost drive is found.

19.8.6 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. It makes getting ready for a new club year something that can be done in just minutes.



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



The [Backup Procedure](#) MUST be completed before running the NYS procedure.



The New Year Setup can be used to create session records to [track VBS](#) or other summer programs.

Introduction

The Introduction page explains the purpose of the NYS and gives an overview of the steps.

New Year Setup: ** disabled because the last backup was created 303 days ago. >>>

Please review the following information before running the New Year Setup procedure.

The New Year Setup procedure prepares the database for a new club year. You do not have to do anything to "close out" a prior year. If you have just purged the sample data and are now going live, this procedure must be run before you enter any clubbers or leaders. If this is your second or subsequent year using the database you will already have clubber records so pay particular attention to the options in Steps 2 and 3. Be sure you work through each step in the proper order. Note: If the new club year value is not listed in the dropdown list of Step 1, you can add it under Admin > Generic Lookups > Club Years.

Tip: Watch the "How to run the New Year Setup" video on the forum. Look under the FAQs and Videos category: www.ApprovedWorkman.com/forum/

Before you proceed with a New Year Setup, you must perform the following tasks:

1. For persons who have not attended in the past couple of years (and who are not Prospects) consider setting their Status to "Archived".
2. Run the Optimize utility under Admin > Database Utilities.
3. Run the Backup utility! <<< Click this button to BACK UP YOUR DATA. Unless this is the first time you are using the database and have not entered any members yet, backup your data before running the New Year Setup procedure.

This New Year Setup is ONLY used to prepare the database for a new club year and to generate the initial set of Club Session Dates. If you have already performed the New Year Setup for the current year and later discover that you need to add another session date or delete a particular session date, do NOT re-run this New Year Setup. Instead, use the "Add or Delete Dates" button under Admin > Club Setup > Club Calendars.

Carefully review the Club Assignment grid in Step 2 to ensure clubbers are promoted correctly using your custom club names. Also, before printing your blank and/or pre-filled Registration forms, review and update your Registration Form text under Admin > Options > Registration Form.

To proceed with the New Year Setup, click through each of the tabs below in the proper order. Take the time to READ THE INSTRUCTIONAL TEXT on each page. Once the procedure finishes, review the log and complete the recommended tasks (e.g. reviewing point values and adding club night themes.)

Caution: There are 5 clubbers with a blank Grade field. The New Year Setup procedure will not be able to assign clubbers to the correct club without this data. (click [here](#) to refresh the count after you have edited records)

Introduction

Step 1 - Session Dates

Use this page to set up the club dates for the upcoming year.

a) Select the new club year and the starting and ending dates:

Club Year: 2018-2019 ONE Session Date will be created each week on the same weekday:
 Starting Date: 9/5/2018 * Ending Date: 5/22/2019
 * Select only dates where attendance is tracked, this normally does not include the Awards night.

b) Establish clubs that will be active in the 2018-2019 club year:

Use the grid below to Add, Edit, or Delete Club Names for the new year. Be sure to keep a generic "Awana" club name for leader assignments.

If you have more than one club night per week, you should adjust the Starting and Ending Dates as needed in the grid below. Also, you'll want to customize the basic Awana club so it indicates the relevant club night such as "Awana - Sun" and add another "Awana - Wed" for example, so you can track leader attendance for both nights.

| Base Club | Club Name | Starting Date | Ending Date | Meeting Day |
|------------------|--------------|---------------|-------------|-------------|
| Awana | Awana | 9/5/2018 | 5/22/2019 | Wednesday |
| Cubbies | Cubbies | 9/5/2018 | 5/22/2019 | Wednesday |
| Journey | Journey | 9/5/2018 | 5/22/2019 | Wednesday |
| Sparks | Sparks Boys | 9/5/2018 | 5/22/2019 | Wednesday |
| Sparks | Sparks Girls | 9/5/2018 | 5/22/2019 | Wednesday |
| Trek | Trek | 9/5/2018 | 5/22/2019 | Wednesday |
| Truth & Training | T&T Adv | 9/5/2018 | 5/22/2019 | Wednesday |

c) Enter the dates that should be excluded:

Dates that fall on a club night during the new club year should be excluded if you already know that no club will be held (e.g. Thanksgiving, Christmas, Easter, etc). Identify them here so they will not be used when the official Club Session records are created.

After typing or selecting a date, press the ENTER key or CLICK THE CHECKMARK at the bottom of the grid to add the date to the list.

To delete a date from the grid, select it and then press Ctrl-Delete or click the minus button.

Click here to add an excluded date

| |
|------------|
| 11/21/2018 |
| 12/26/2018 |
| 1/2/2019 |
| 4/3/2019 |

Introduction Step 1 - Session Dates Step 2 - Promotions Step 3 - Club Assignments Step 4 - Resets and Defaults Step 5 - Run the Procedure

Close

a) Select the new club year and the starting and ending dates

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".



This will not be enabled unless the [Backup Procedure](#) has been run.

2. 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 generally kept for that night.

b) Establish clubs that will be active in the new club year

During the initial setup, all clubs are listed by default. In future years, it will default to the clubs used in the prior Club Year.

1. Edit the Club Names if desired.
2. Add any personalized clubs ("T&T Adventure," "T&T Challenge," or "Sparks Girls" and "Sparks Boys" etc.) by clicking the '+' (**plus**) button and then entering the personalized name.
3. Remove any club that is not offered (Nursery, for example) by selecting that club's row and then clicking the '-' (**minus**) button to delete it.



We recommend keeping the "Awana" base club as this is the generic club name to assign leaders to that don't belong in the other clubs (Commander, Secretary, etc.).



For clubs that meet on a different day of the week, the starting and ending dates can be modified in the grid. The Meeting Day field will be updated accordingly.

c) Enter the dates that should be excluded

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

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

Step 2 - Promotions

Use this page to select options for the promotion of clubbers including when to 'graduate' a clubber.

Promote each clubber's School grade to the next level?

1. Select whether or not to automatically have each clubber advanced one grade.
2. For most situations, clubbers are promoted to the next logical grade. For preschool age children, promotion also considers the clubber's age. Select the date(s) to use as the cut-off for this evaluation. The default is the date of the first club session, but can be changed.
3. When a clubber is promoted OUT of the last grade of the Awana program, the status is set to "graduated". If your program does not run through 12th grade, choose to **Set a clubber's Status to "Graduated" if promoted to grade...** and indicate the grade.

Allow this procedure to automatically handle Club promotions?

Read the notes on the dialog and select from the drop-down menu.

Allow this procedure to archive clubbers? leaders?

Allowing the procedure to archive a person will set the person's status to "Archived". The person is NOT removed from the database and the status can be returned to "Active" if needed.

1. Check the appropriate box to archive clubbers, leaders, or both.

2. A person will be archived based on how long it has been since they have attended. Jan. 1 of the current year will be used as the default, but another date can be selected.



Another good option for a date is the first meeting date for the club year so any member that has not attended during the entire club year will be archived.

Step 3 - Club Assignments

The grid sets up the defaults used for Club Assignments. All of the Club Names listed in the box on the right should be included in the grid on the left (except Awana which is used for leaders). This grid limits assignments to specific Grade and Gender combinations. There must be a single club assignment for a specific grade and gender combination.

Club Assignments

| Grade | Gender | Club Name in 2018-2019 | Meeting Day |
|-----------------------------|--------|------------------------|-------------|
| Click here to add a new row | | | |
| P1 | Female | Cubbies | Wednesday |
| P1 | Male | Cubbies | Wednesday |
| P2 | Female | Cubbies | Wednesday |
| P2 | Male | Cubbies | Wednesday |
| K | Male | Sparks Boys | Wednesday |
| K | Female | Sparks Girls | Wednesday |
| 1 | Male | Sparks Boys | Wednesday |
| 1 | Female | Sparks Girls | Wednesday |
| 2 | Male | Sparks Girls | Wednesday |
| 2 | Female | Sparks Boys | Wednesday |
| 3 | Female | T&T Adv | Wednesday |
| 3 | Male | T&T Adv | Wednesday |
| 4 | Male | T&T Adv | Wednesday |
| 4 | Female | T&T Adv | Wednesday |
| 5 | Female | T&T Chall | Wednesday |
| 5 | Male | T&T Chall | Wednesday |
| 6 | Female | T&T Chall | Wednesday |

Important: Except for the base club "Awana", make sure Club Names referenced in the Club Assignment grid at left match the Club Names established in Step 1 (and shown below).

For example, if you used "T&T" in Step 1, select "T&T" in this grid and not "Truth & Training". Also be sure every Club Name displayed below (except "Awana", "VBS", or "Camp") DOES EXIST in the grid.

Club Names for the new year:

- Awana
- Cubbies
- Journey
- Sparks Boys
- Sparks Girls
- T&T Adv
- T&T Chall
- Trek

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To change the defaults, click in a cell in the grid and select a different option from the drop-down menu in that cell.

If you created personalized club names in **Step 1**, those clubs should be added to the grid. Click **'+' (plus)** to create a blank row at the top of the grid. Select the **grade, gender, club name** and **meeting night** from the drop-down menus. When finished, click the small **checkmark** below the grid to save the record.

Step 4 - Resets and Defaults

Use this page to automatically reset, clear or waive certain pieces of information from last year.

New Year Setup: ** disabled because the last backup was created 158 days ago. >>>

Resets

All 'Registration Current' and 'Registration Date' values will be cleared to make it easy to use the Clubber and Leader Lists to see those who are not yet registered for the new year.

Reset (clear) the following Permission values for all Members:

Medical Release Activity Photo Use Travel Other

Reset all Active Members to Inactive? Yes ▾

Reset all Visiting Members to Inactive? Yes ▾

Reset the Points for all Members to Zero? Yes ▾

If you want each member's unused points to carry over to the new club year, select 'No' and those points will be added to the 'Other Points' category for the 1st club week.

Reset (clear) the Uniform field values when a clubber gets promoted to a new base club? Yes ▾

Clear current values

Clear the Team Color for all Members? Yes ▾

Clear the Team Name for all Members? Yes ▾

Clear the Leader Assignment for all Clubbers? Yes ▾

Clear the Code field for all Members? Yes ▾

Clear the Club Assignments for all LITs? Yes ▾

Answering 'Yes' only clears the LIT Club Name, not the LIT role so you will still be able to identify LIT's

Clear the Leadership Role Club Assignments for all Leaders? No ▾

Answering 'No' will cause AWdb to use existing club assignments and roles when creating records for the new year. Answering 'Yes' will clear the current assignments and you will need to enter them once you know which leaders will be serving in the new year and which club(s) they will be assigned to. Keep in mind the Leader version of the Registration form will show only Service HISTORY (prior years) so the choice above does not affect the Leader Registration form. Basically, if most leaders will be serving in the same leadership roles in the same clubs as last year, answer 'No'.

Waive Balance on Fees

Waive the Balance Due on All Unpaid Fees? Yes ▾

Answering 'Yes' will cause the system to create a waived Payment record for each unpaid Fee to offset the balance due. The Payor will be listed as 'A Sample Church'.

Offering Fund

The Default Offering Fund will be used for all new session records. After running NIS you may specify different Funds for each week. Missions ▾

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Close

Resets; Waive Balance on Fees; Clear current values

Carefully read the detailed descriptions of each item and indicate **Yes** or **No** for each.

Offering Fund

Choose a default value. These can be customized under [Admin > Generic Lookups > Donation Purpose/Funds](#).

Step 5 - 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 showing changes, updates, calendar settings, promotions and book assignments is generated.



Throughout the procedure some alert dialogs might pop up with notifications of certain areas in which the updating of records is unnecessary. If such notices pop up, simply click **Yes** to continue the procedure.

2. Once the NYS is done, read the **log** to confirm that it updated records as expected. As instructed at the end of the log, **print** at least the last page to use as a check list of what to do next to prepare for the new club year.
3. Complete preparation for the New Year by reviewing details under the [Club Setup](#) section.

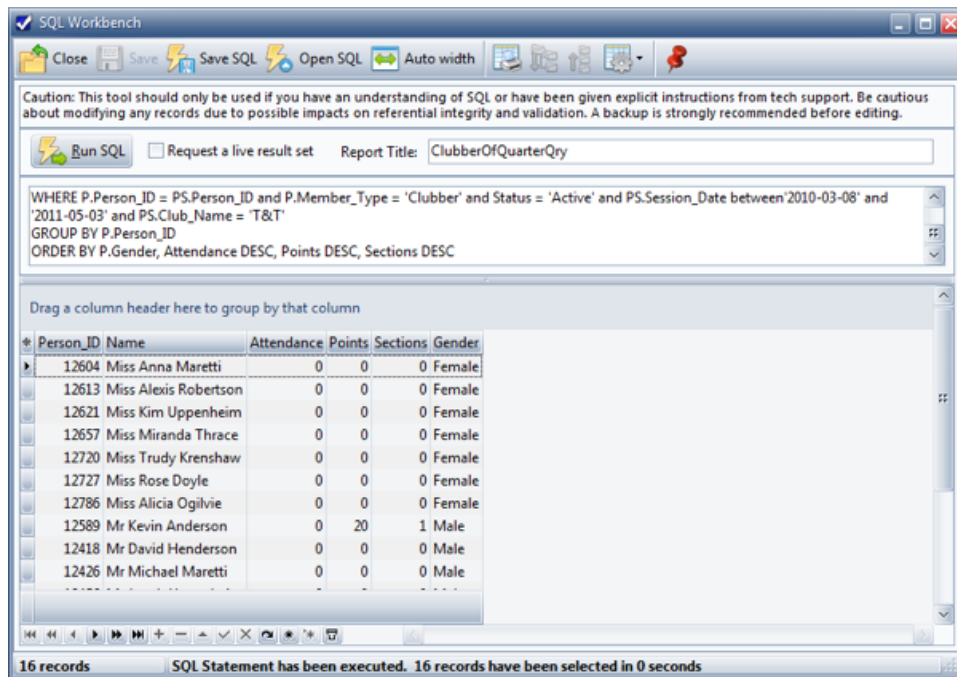
19.8.7 SQL Workbench












Even though AWdb 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 [AWdb Forum](#) and have a look at the SQL Workbench topic.




This tool should only be used with an understanding of SQL or with explicit instructions from Customer Support. Be cautious about modifying any records due to possible impacts on referential integrity and validation. And as always, before editing any data, [create a backup](#) of the database!



| <u>Icon</u> | <u>Action</u> | <u>Description</u> |
|---|--------------------|---|
|  | 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. And as always, before editing any data, [create a backup](#) of the database!

- If the grid's data is going to be printed, specify a **Report Title** to use as the title of the printed report.

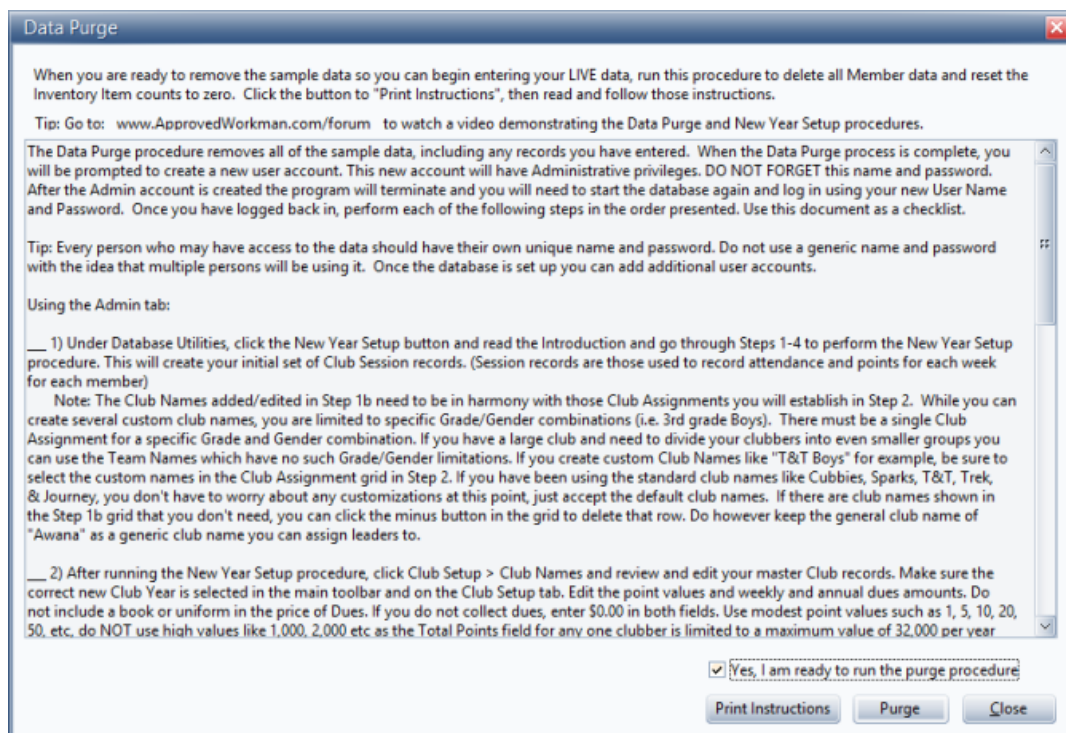
19.8.8 Purge Sample Data

 The purpose of this utility is to delete the sample data from the trial version of AWdb in order to start entering live club data.

 If you are using the Data Purge Utility on your own records for some reason, make sure you [run a backup](#) before the purge, in case you change your mind after erasing all the records from your database. If this happens, you will be able to [restore](#) the backed up data by using the Restore Utility.

 If you have not spent some time playing around with AWdb using the sample data, you might want to skip this section for now. Come back to it when you are ready to begin entering your own data.

1. From the **Admin > Database Utilities** tab, click **Purge Sample Data** to open the Data Purge dialog.



2. Read the information given in this window.
3. Click **Print Instructions** to use this as a check list to setup the database.
4. Check the box next to **Yes, I am ready to run the purge procedure**, which will enable the **Purge** button.
5. Click the **Purge** button.
6. On the Confirmation dialog, when ready to continue with the purge, click **Yes**. The Data Purge utility deletes ALL data records.

7. When all the data is purged, a notification will indicate that a new user account for the database will be created. Click **OK** to open the New Admin User dialog.

New Admin User

Create the primary User Account with Administrative privileges. Do NOT forget the User Name and Password you enter below or you will not be able to get into the database.

You can modify this User account, and create accounts for additional users under the Users tab of the Administration form.

User Name: <- This name (typically a user's First Name) is used in combination with the Password to log into the database

Password: <- Passwords are case-sensitive and must contain at least five characters

Screen Name: <- A unique short name to identify user timestamps (e.g. "Elizabeth J")

Full Name: <- A user's First and Last name

OK

8. Enter the desired **User Name**, **Password**, **Screen Name**, and **Full Name**.



Make sure to note the new User Name and Password so you don't get locked out of the database! The log-in/password of demo/demo will no longer work.

9. Click **OK**. A notification will be given that the database must close.

10. Click **OK** to close the database.

11. Log in with the new admin user account. All data records will have been purged.



[Set up a new club year](#) before beginning to enter clubber or leader information.

19.8.9 Error Log



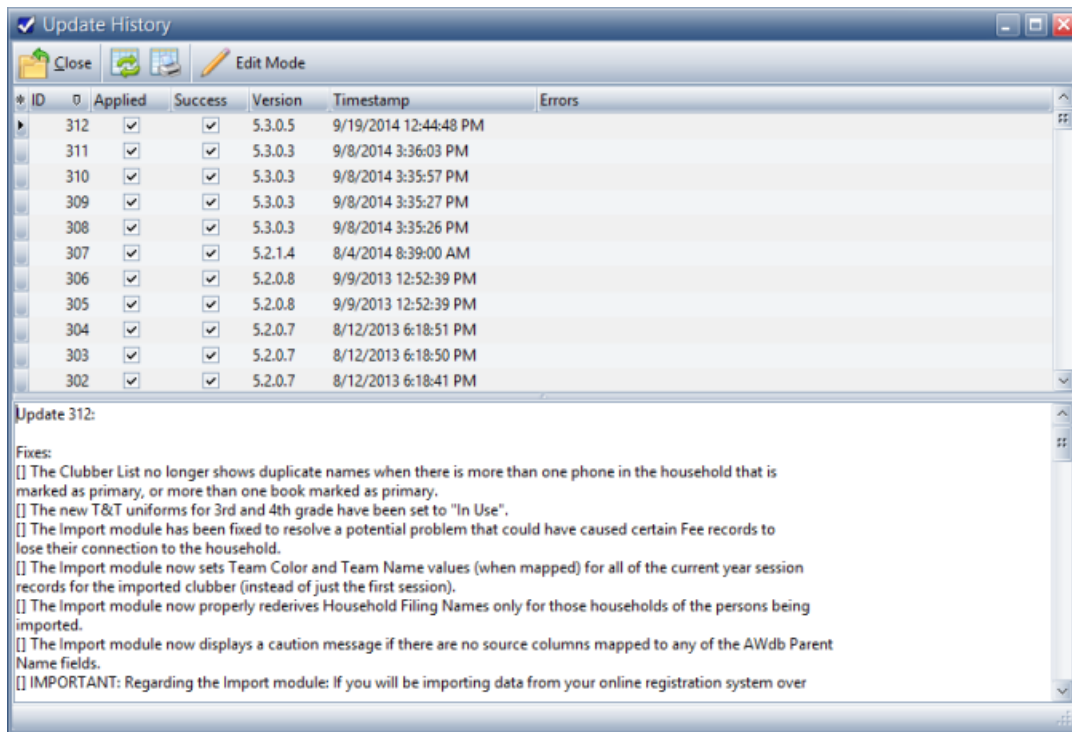
Use this utility to view past errors in the program. This might be useful when working with Tech Support to track down a problem. Unwanted records can be deleted by either clicking the **Delete Selected Errors** or the **Delete All** button.

| ID | User | Error Timestamp | Version | Error Description |
|----|------|----------------------|---------|--|
| 8 | Jane | 8/22/2012 6:19:21 PM | 5.0.1.3 | FormAccountAndUpdateInfo.FormCreate: DBISAM Engine Error # 11280 A connection to the database server at '97.88.241.34' cannot be established |

19.8.10 Update History



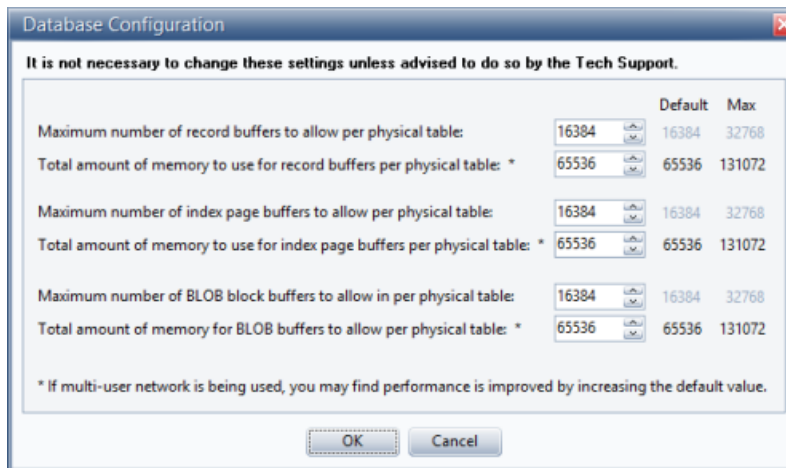
Use this utility to view the history (log) of updates that have been applied to AWdb. Select a row to view the details of the fixes and enhancements for the selected update. Also see whether the updates were successfully applied or if there were any errors.



19.8.11 Database Configuration



Use this utility to alter the configuration of the database.



19.8.12 Data Import



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

1. **Initial Data Load:** populate an empty database after purging the sample data and running the **New Year Setup**. (For new users of AWdb.)

2. **Online Registration:** add or update existing records with a data file from an online registration website. (For existing users of AWdb.)



Before importing data from an online registration file, be sure that:

- the New Year Setup procedure has been run for the current club year, and
- that a backup that was created using AWdb's built-in backup utility, and
- that no other users are logged in when this procedure is run.

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.

✓ Data Import ✕

Please read this important information before attempting to use this utility.

Current Club Year: 2013-2014 First Club Date: 9/4/2013

Purpose: This utility provides the capability to import data from an external file for either of the following two scenarios:
 1) Initial Data Load: To enable a club just getting started with AWdb to populate an empty database after purging the sample data and running the New Year Setup.
 2) Online Registration: To enable an established club to add or update existing records with a data file from their online registration website.
 Important: Before importing data from your online registration file, be sure that: a) the New Year Setup procedure has been run for the current club year, and b) that you have a backup that was created using AWdb's built-in backup utility, and c) that no other users are logged in when you run this procedure.

File Types: Data may be imported from an "Excel 97-2003 workbook (.xls)" file format, a .CSV, or a .TXT file. If using a .CSV or .TXT file, the structure must include the column header names in the first row, with data in subsequent rows, and each column header and data cell must be separated (delimited) by a comma or a TAB. If using a comma delimited file, any cell containing a comma as part of the data must be enclosed in quotation marks. If using an Excel file format, be sure to remove formulae and column formatting before loading the file in Step 1.

Limitations: The type of data that may be imported is limited. For example, a person's name and contact information (phones, email addresses, parents, emergency contacts), birthdate, grade, gender, school, church, and allergies and such may be imported, but data related to attendance or handbooks cannot be imported and must be entered manually after the import process has completed.

Club Names: If you import club names, ensure that your source file club name values will match the AWdb Club Names established under Admin > Club Setup > Club Names. If you do not map a source field to the AWdb Club_Name field, and/or if the source field is blank or contains a non-matching value, then a club name will be assigned during the import process based on a person's Grade and Gender values and the Admin > Club Setup > Club Assignment records. Persons without a club name, grade, and gender will still be imported, but there will be no club assignment, and thus no attendance records.

For Best Results: Be mindful of the following: a) When mapping fields pay close attention to the AWdb Field Notes. b) Review source data for consistency. For example, all members of the same household (regardless of their names) should have the same Address_Line1 and Postal_Code so that they will be accurately grouped into the same household. c) Ensure consistent values for columns such as Church and School Names since these values will be added to the list of generic lookup values. d) When an AWdb Field Note lists VALID CHOICES (followed by a list of values), examine your source data to confirm the values are compatible. If they are not, then you may want to modify your source data before running the procedure because invalid values will be blanked.

Addresses: If your source file has the City, State and Postal (ZIP) Code all combined in the same field (e.g. "Madison, WI 53714") you will need to alter your source file so that your City, State, and Postal_Code data are in separate columns that can be mapped to the separate AWdb field names of: City, State, and Postal_Code.

Introduction | Step 1: Select the Source File | Step 2: Map the Fields | Step 3: Select Options | Step 4: Run the Procedure

Close

Step 1 - Select the Source File

Use this page to identify the source file of the data 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.

Data Import

Select the Source File (must be an Excel 97-2003 (.xls), or a comma delimited (.csv), or Tab delimited (.txt) file) After the source file is loaded, review the data in the grid below and correct any typos, invalid or inconsistent values. (see the Step 2 Field Mapping Notes)

C:\Users\Annette\Clubbers.xls

| | A | B | D | E | F | G | H | I |
|----|--------------|------------|--------|------------|-------|--------------------------|----------------|------------------------|
| 1 | Last Name | First Name | Gender | Birthdate | Grade | Parent Name | Primary Phone | Primary E-mail |
| 2 | Adler | Andy | Male | 5/2/2002 | 6 | Doug Adler | (608) 587-5123 | billsusan@gmail.com |
| 3 | Brackeneimer | Kati | Female | 11/5/2003 | 4 | Melinda Brackeneimer | (608) 456-4566 | melbrack@spot.net |
| 4 | Brackeneimer | Kevin | Male | 12/7/2005 | 2 | Melinda Brackeneimer | (608) 456-4566 | melbrack@spot.net |
| 5 | Carson | Benjamin | Male | 9/20/2002 | 6 | Mr and Mrs Carson | (608) 555-1278 | carson4@hotmail.com |
| 6 | Carson | Christina | Female | 7/21/2005 | 3 | Mr and Mrs Carson | (608) 555-1278 | carson4@hotmail.com |
| 7 | Douglas | Janetta | Female | 10/15/1997 | 11 | Ann Wells | (608) 888-9977 | |
| 8 | Farmer | Daniel | Male | 2/16/2002 | 6 | Michael & Kristen Farmer | (608) 555-8845 | thefarmers@hotmail.com |
| 9 | Farmer | Jonah | Male | 6/14/2005 | 3 | Michael & Kristen Farmer | (608) 555-8845 | thefarmers@hotmail.com |
| 10 | Farmer | Marjorie | Female | 2/1/2004 | 4 | Michael & Kristen Farmer | (608) 555-8845 | thefarmers@hotmail.com |
| 11 | | | | | | | | |
| 12 | | | | | | | | |
| 13 | | | | | | | | |
| 14 | | | | | | | | |
| 15 | | | | | | | | |
| 16 | | | | | | | | |
| 17 | | | | | | | | |
| 18 | | | | | | | | |

Introduction Step 1: Select the Source File Step 2: Map the Fields Step 3: Select Options Step 4: Run the Procedure

Select the input source file and then click the Import button.

Close

Step 2 - Map the Fields

Use this page to map the source columns to the corresponding AWdb field names. On the left is a list of the **Unassigned Source Columns**. In the grid, identify the **Source Column** for an **AWdb 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 for each field carefully to assure data is in the correct format and that you understand how each field is used.

Data Import

Map the source columns to the corresponding AWdb field names for any data you want imported.

Unassigned Source Columns

- Allergies
- Grade
- Parent Name
- Primary E-mail
- Primary Phone
- State
- Zip

| Source Column | AWdb Field Name | Data Type | Field Size |
|-------------------|--------------------------------|-----------|------------|
| Address Line 1 | Address_Line1 | String | 50 |
| Allergies | Allergies | String | 40 |
| Baptism Date | Baptism_Date | Date | 10 |
| Bible Translation | Bible_Translation | String | 10 |
| Birthdate | Birth_Date | Date | 10 |
| City | City | String | 50 |
| First Name | Church_Name | String | 40 |
| Gender | City | String | 30 |
| Grade | Club_Name | String | 20 |
| Last Name | Code | String | 5 |
| Parent Name | Doctor_Name | String | 40 |
| Primary E-mail | Doctor_Phone | String | 40 |
| Primary Phone | Email_Address | String | 50 |
| State | Emergency_Contact_FName | String | 40 |
| Zip | Emergency_Contact_LName | String | 40 |
| | Emergency_Contact_Name | String | 40 |
| | Emergency_Contact_Phone | String | 50 |
| | Emergency_Contact_Relationship | String | 20 |
| | External_ID_Household | String | 10 |

Allergies

This field should contain only a list of things a person is allergic to. The import process will remove the words "allergies" and "allergic to".

Field Mapping Notes

Notes:

Source columns that do not map to a specific AWdb field may be appended to the AWdb Notes field. Map up to four source columns using: Notes, Notes_2, Notes_3, and Notes_4.

(When mapping to these four notes fields, the source column names will be used as labels preceding each value.)

Clear the current field mappings

Print a Field Mapping Report

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Map the Source File Columns to the appropriate AWdb Fields Names.

Close

Step 3 - Select Options

Use this page to select to import as an **Initial Data Load** or from **Online Registration**. Detailed descriptions are included as well as **Important Notes**.

Data Import

Select the Scenario and Options

Initial Data Load
Select this option if you are just getting started with AWdb and need to import data from one or more external files (for example, one file for Clubbers and another for Leaders). No person matching* is needed therefore all records in the source file will be inserted into the database and the member Status values (if mapped from the source file) will not be changed from what they are.

Set each imported member's Status to "Active", and set their Registration to "Current" if mapped Registration Date >= 9/4/2013

Online Registration
Select this option if your club is already using AWdb and you want to add or update existing records with a data file from your online registration website. Person matching* will be attempted to avoid creating duplicates. Matching records will have specific fields updated with data from the source file (as per the field mappings), and non-matching records will be inserted into the database as new.

Set each imported member's Status to "Active", and set their Registration to "Current"

For the Registration Date, use: The value in the field mapped to "Registration_Date" <-- no Source Field was mapped to the AWdb Registration_Date field
 A Registration Date of : 9/4/2013

Important Notes:

- Payment records will be created if there is a field mapped to the AWdb field "Payment_Amount", however it will be recorded as an "Unapplied Payment" and as such it will need to be manually applied through the Household Ledger form.
- Tip: After the import process has completed, open the Registration Window (from the popup menu of the Clubber List) where you can quickly review the imported data, assign books and uniforms, apply payments, and print pre-filled Registration Forms for signatures and Household Account Statements as needed.
- * Person matching, (used only in the Online Registration scenario) tries to avoid creating duplicate person records by comparing the First Name + Last Name + Birth Date of the incoming records to the same fields of existing records. If a match is found, the existing member record will be updated with the mapped field values from your source file. If no match is found, a new member record is created. Thus it is critical that your source data contain accurate non-blank First_Name and Last_Name and Birth_Date values or you will end up with duplicate records. If a matching person is found during the import process, relevant Phone numbers and E-mail addresses that have been modified within the last 30 days will NOT be deleted by incoming records of the same type (e.g. Home Phone, Cell Phone, Emergency, etc).

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Select the applicable scenario and related options.

Close

Step 4 - Run the Procedure

Once the setup is complete, use this page to run the Data Import Procedure.

Data Import

Run the Procedure:

Loading Source File: "C:\Users\Annette\Clubbers.xls"
Success.

Loading column names...
Success.

Begin Processing
Print the log
Save the log

Introduction Step 1: Select the Source File Step 2: Map the Fields Step 3: Select Options Step 4: Run the Procedure

Close

1. After reading any reminders or warnings on the screen, click **Begin Processing**. A log showing the steps of the import process is generated.

2. Once the Data Import is done, read the log to make note of any items that might need to be reviewed. **Print** or **Save the log** if desired.
3. Click **Close** when finished.

Chapter

20

20 AWdb 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.

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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