



Vision Computer Programming Services, Inc.

801 2nd Street, Suite A Safety Harbor, FL 34695

888-425-6964

email@visioncps.com

www.visioncps.com

SET UP Activities

1. To create new activities to track, go to Organization Information.
2. Type in your Name and click I Understand.
NOTE: If you are a multiple unit organization that imports data back to a central location, then steps 1 thru 7 MUST be performed at the administrative office.
3. Click on the Activities tab.
4. Click on the Add Activity button in the bottom left hand corner.
5. Fill in the Activity Description, Abbreviation (this shows on the Activity Calendar) and Activity Classification.
6. All other items here are optional.
 - Maximum number of Members per session
 - Default Start Time – this helps with scheduling later
 - Default Duration – this helps with scheduling later
 - Comment
 - Account: You can tie in an account fee to this activity
 - A Parent/Guardian must be named to pickup a member allows you to record which contact picked up the member.
 - The Force General Attendance will give members an attendance record for General Attendance even if the member scans only for that other activity.
7. Click on Add Activity which will take you back to the main activities screen with your new activity displayed.
8. Counts as Club Attendance – designates which activities count as a standard Club Attendance. Uncheck it if it is used to track non-club activities such as off-site Community Service.
9. Track why Members leave this Activity: Click on the **BLUE ?** for more information on this feature.
10. To add another Activity click on the Add Activity button again and fill in the information.
11. When you are done with adding new Activities, close Organization Information.

SCHEDULE ACTIVITY

12. Click on the Activities button on the Main Menu.
13. Click on the Schedule Activities button in the lower left corner.
14. Choose your Unit if it is different from what appears on the screen.
15. From the Activity pull-down menu, choose General Attendance. This will be the first activity you create. You can set up all additional activities, using these same steps.
16. From the Location pull-down menu, choose Front Desk or the location that is applicable. If you don't see the location you want then type a new one in. The system will ask if you want to add it, just click on Yes to add the new location.
17. From the Attendance Method pull-down menu, choose In/Out or Simple. If you want to track the number of members who attend your club, choose the Simple option. If you need to track specific In/Out times when members attend, choose In/Out.
18. Fill in a Comment if needed
19. In the First Sched. Date field, choose today's date if you want to start adding General Attendance or another activity immediately. You can back date if you need to enter in attendance for previous dates.
20. In the Start Time field, enter the earliest time members can enter the club. This will fill in automatically if the correct Default Start time was entered in Organization Information.
21. In the End Time field, enter the latest time members can leave the club. This will fill in automatically if the correct Default Duration was entered in Organization Information.
22. You can **OPTIONALLY** choose a Staff person to be assigned to the Activity from the dropdown. If there is no staff in the list, then go to the Staff/Volunteer section from the Main Menu and add your staff.
23. Select how frequently you want to schedule the activity. **NOTE:** We recommend you only schedule activities about a month in advance because schedules and times change and you don't want to have to go back and remove or change these items. This also helps you to remember how to do the scheduling of activities on a regular basis.
24. Schedule Activity to occur once only schedules it for that day
 - OR Repeat Activity Daily schedules the activity for the days of the week you choose
 - a. Place a checkmark next to the days of the week you are open.
 - b. Select This many times if you want to schedule it for 1 time Mon thru Fri or;
 - c. Select Thru this date and click on the calendar button to choose an end date. (This is the most commonly used)
 - OR Repeat Activity Monthly Thru and choose a month from the dropdown
 - d. Or on a specific day of the month
 - e. Of on a specific day of the week

25. Click on the Schedule Activity button. If you have setup your holidays and days that your club is closed during the year in Organization Information/Standards on the Holidays tab, you will be prompted to set or not set your schedule on those pre-set holidays. If the club is not open on these dates, click "No" so the activity won't be scheduled on your preset holidays.
26. You will receive a message Scheduling Completed, click OK and Close the Schedule Activities window. If you want to print a copy for your records, click on the "Print Hardcopy" button at the lower right-hand side of your screen.
27. After you have scheduled all of your activities for the month close out of Activity Calendar.
28. During the last 5 days of each month you will receive an Activity Schedule Advisory letting you know how many Activities are scheduled for the upcoming month. If there are 0 Activities scheduled then you will need to schedule those Activities that you want to track before the end of the month.

QUICK ENTRY

29. From the Main Menu, click on Quick Entry.
30. Verify that the time and date is correct. If it is not correct, change the time and date on your computer's clock generally in the lower right hand corner of your computer.
31. Verify the Activity Date is correct.
32. Check that the Unit and the Activity are correct for the activity that you are scanning for.
33. Scan your members, by using a bar code scanner, typing in a member number or last name in the large white box on the bottom of the screen, and then press enter on your keyboard to create a new scan. Click Yes- OK to Proceed, Yes- Ok to Proceed & Create transaction or No -Cancel finish. When scanning is complete, close out of Quick Entry.
34. You can also scan for any other Activity by choosing another Scheduled Activity from the dropdown in the center of the screen.
35. Try the Open Batch Attendance Form button to record members attendance in bulk.

ATTENDANCE CALENDAR

36. From the Main Menu, click on Attendance Calendar.
37. Choose your Unit and Activity in the top right.
38. Choose the Month Year.
39. Type in x or X in each box for each member who attended on that day.
40. Click the Global Change Day Code to change everyone from ' ' - No Attendance Code to 'x' - Half Day.

ACTIVITIES

If your members have already been checked into General Attendance or if your members are in Groups then they can also be copied to other Activities.

Copy members from an Activity into another Activity:

41. From the Main Menu, click on Activities.
42. Find the day that you would like to copy Activities for and double click on the General Attendance Activity – this will open a Session Details screen.
43. On the left you will see the Attendees box with your members that have already been checked into General Attendance for that day.
44. Click on the Select All button on the bottom left if all the members also attended the additional activity.
45. Optionally, if some members did not attend then hold your CTRL key down and click on their name to unselect them.
46. Optionally, use the Open U.S.E button to add additional filters such as a Group or Age range or Gender.
47. Click on the Other Attendance tab in the center of the screen.
48. Choose the Unit.
49. Choose the Activity that you want to copy members into.
50. Click the green arrow and all the members that you selected on the left will have attendance records for the Activity that you choose on the right.

Copy members from a Group into an Activity:

51. From the Main Menu, click on Activities.
52. Find the day that you would like to copy Activities for and double click on an Activity – this will open the Session Details screen.
53. On the Groups tab choose the Target Unit in the center of the screen.
54. Choose the Target Group.
55. Click on the Select All button on the bottom center if all the members of this Group attended the additional activity.
56. If some members did not attend then hold your CTRL key down and click on their name to unselect them.
57. Click the left pointing green arrow and all the members that you selected in the Group will have now attendance records for the Activity that you are working with.