

Attendance 8.3.1 to 8.4.x

User Guide
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What is the Attendance tool?

The Attendance tool enables you to create registers that track attendance for activities within your organization or course. You can track attendance for any number of activities and customize your registers to suit your needs.

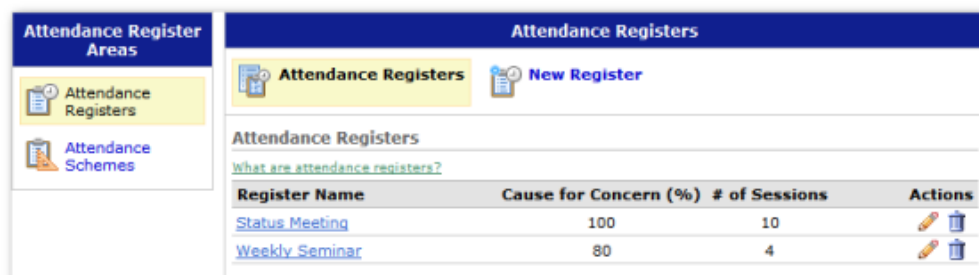
The Attendance tool is flexible and convenient. You define the sessions, attendance thresholds, and applicable users for each register. When you enter your attendance data, the Attendance tool displays a summary of the results for you, in one convenient location.





Use the Attendance tool to:

- create sessions to track attendance
- define attendance statuses for your activities
- grade user attendance
- view attendance results
- track users that have poor attendance

Accessing the Attendance tool

To access the Attendance tool, click the **Attendance** link on the navbar.



Register Name	Cause for Concern (%)	# of Sessions	Actions
Status Meeting	100	10	 
Weekly Seminar	80	4	 


Attendance homepage

Creating attendance registers


Create attendance registers to track attendance for your course-based activities. You can create attendance registers to track attendance for specific course activities, like

mandatory weekly Chat sessions, or even for more general activities, such as status meetings or optional seminars.

► **To create a new register**

- 1 From the Attendance page, click  **New Register**
- 2 Enter a **Name** for your register.
- 3 Enter a description.
- 4 Choose an attendance scheme from the **Attendance Scheme** drop-down menu. See *Creating attendance schemes* for instructions on creating a new attendance scheme.
- 5 Select the users that you want to include in your register. You can choose to include all users or just specific groups and/or sections.
- 6 Add one or more sessions for your register.
- 7 Click the **Save** button.

Using Cause for Concern

Use the **Cause for Concern** metric to track users that fail to meet your attendance requirements. If a user's attendance percentage falls below this mark, the  **Cause for Concern** icon appears in the Attendance column on the Attendance Data page.

► **To add a Cause for Concern metric**

- 1 From the New Register page or the Edit Register page, enter a percentage (0-100) in the **Cause for Concern (%)** field.
- 2 Click **Save**.



Using Sessions

Use sessions to define one or more events for your register. Your sessions represent the collective events that make up the register.

For example, if you want to track attendance for a weekly seminar, you would create a "Weekly Seminar" register and then add sessions for each seminar, using distinguishable session names (week 1, week 2, week 3, etc.).

The attendance data that you add for the sessions is summarized and displayed on the register's Attendance Data page.

► **To add sessions to a register**


- 1 From the Attendance page, click the  **Edit** icon for your register.
- 2 Click  **Add Sessions** in the Sessions section.

Note Enter a number in the corresponding field to add multiple sessions at one time.

- 3 Enter a name for each session.


- 4 Enter a description for each session.
- 5 Click **Save**.

Deleting attendance registers

Click the  **Delete** icon beside a register on the Attendance page to remove unused and out of date registers.

Important Deleting an attendance register clears all attendance data that exists in the register. Only delete registers when you are confident that the attendance data is no longer needed.

Deleting sessions

You can delete sessions in a register by clicking the  **Delete** icon beside the applicable session on the Edit Register page. All attendance registers must have at least one session.

Important Deleting a session clears all associated attendance data. Only delete sessions when you are confident that the attendance data is no longer needed.

What are attendance schemes?

Attendance schemes provide the criteria for marking attendance in a register. Each attendance register uses one attendance scheme, which you assign when creating a new register. The register defines the applicable users and sessions, and the attendance scheme defines the attendance statuses that you can give to users for each session.

For example, a simple attendance scheme defines two possible attendance statuses: present and absent. If you were to apply this scheme to an attendance register, you would have two options for marking attendance for the register's sessions. Users that attend a session would be marked as present and users that do not attend would be marked as absent.

You can create more complex schemes that define more statuses such as late and authorized absent. This provides flexibility to accommodate a wide range of attendance options. You can also assign percentages to your statuses to apply *attendance* credit automatically. See *Using attendance statuses* for more detailed information.

Organization attendance schemes

Organization attendance schemes are attendance schemes created and managed at the organization level. They are automatically made available to all child org units and can be easily copied to create your own course schemes.

System Scheme

The System Scheme is a basic organization attendance scheme, which cannot be edited or deleted, consisting of the following attendance statuses:

Symbol	Status Full Name	Assigned %	Order
P	Present	100	1
A	Absent	0	2




Course attendance schemes

Course attendance schemes are created and managed by child org units. They are only available to the org unit that created the scheme. As such, an attendance scheme created in org unit A cannot see or use a course attendance scheme created in org unit B and vice versa.

Creating attendance schemes



The System Scheme may be sufficient for some registers, but creating a new scheme allows you to utilize more statuses and adjust their assigned percentages. This enables you to create statuses that reflect your desired attendance objectives and add more flexibility to your credit system.

► To create a course attendance scheme

- 1 Click the **Attendance** link on the navbar.
- 2 Click  **Attendance Schemes** in the Attendance Areas panel.
- 3 Click  **New Scheme**.
- 4 Enter a name for your scheme.
- 5 In the Attendance Statuses section, enter a **Symbol**, **Status Full Name**, **Assigned %** and **Order** for each of your statuses.
- 6 If you need more than three statuses, click  **Add Statuses**.

Note Enter a number in the corresponding field to add multiple statuses at one time.
- 7 Click the **Save** button.

► **To create an organization attendance scheme**



- 1 From My Home, click the **Attendance Schemes** link in the **My Admin Tools** widget.
- 2 Click  **New Scheme**.
- 3 Enter a name for your scheme.
- 4 In the Attendance Statuses section, enter a **Symbol**, **Status Full Name**, **Assigned %**, and **Order** for each of your statuses.
- 5 If you need more than three statuses, click  **Add Statuses**.
- 6 Click the **Save** button.

Copying attendance Schemes

Alternatively, save time by copying an existing scheme, such as the System Scheme, rather than creating a new scheme from scratch. You can then update the properties of the copied scheme for your desired outcome.

Copying an Attendance Scheme retains all statuses from the original scheme and creates a new scheme with the name Copy of {name of the original scheme}.

► **To copy an attendance scheme**

- 1 Click  **Attendance Schemes** in the Attendance Areas panel.
- 2 Click the  **Copy** icon in the Actions column for your Attendance Scheme. Your copied scheme automatically displays on the Attendance Schemes page.

Using attendance statuses

Use attendance statuses to define the criteria for your attendance schemes. Statuses consist of four fields: **Symbol**, **Status Full Name**, **Assigned %**, and **Order**.

#	* Symbol	* Status Full Name	Assigned %	Order	Delete
1	P	Present	100	1	
2	L	Late	75	2	
3	A	Absent	0	3	

Attendance statuses section

Symbol Use this field to indicate the abbreviated name of the status. Improve recognition by using symbols that intuitively reference the corresponding status name (A for absent, P for present, etc).

Status Full Name This field should accurately describe the attendance status, such as *Late*, *Present*, and *Absent*.

Assigned % This optional field determines the weight that each status is given towards the percent attendance for the register.

Order This field determines the display order of the statuses.

Using Assigned %

While this field is optional, adding an **Assigned %** value to your attendance statuses enables you to automatically allocate attendance credit and set attendance expectations.

The assigned percentage for a status determines whether a status is included in the % **Attendance** calculation on the Attendance Data page. If a status's **Assigned %** is blank, then any instances of that status are ignored in the user's overall attendance calculation.

% Attendance Calculation

The % **Attendance** is calculated using the formula:

$$\text{Sum of Assigned \%} / \text{Total of statuses with an Assigned \%} \times 100$$

To understand how this calculation works in practice, consider a scheme with the following set of statuses:

Symbol	Status Full Name	Assigned %	Order
P	Present	100	1
A	Absent	0	2
L	Late	75	3
AA	Authorized Absent		4


If the associated register has four sessions and you assign a user each of the above statuses (one for each session), their % **Attendance** would include the **P**, **A**, and **L** statuses and ignore the **AA** status since its **Assigned %** is blank. As such, the user would have a % **Attendance** of 58.33 ($100 + 0 + 75 / 300 = 58.33$). Adding an **Assigned %** of 100 to the **AA** status would change the user's % **Attendance** to 68.75 ($100 + 0 + 75 + 100 / 400 = 68.75$).

Editing attendance statuses

You can safely add new statuses to an existing scheme without impacting your attendance data. This enables you to add more options and flexibility to your attendance schemes.

You can also edit the fields of your statuses, even if the scheme is being used in a register. When you save your changes, all associated attendance data is automatically updated.

► **To edit attendance statuses**


- 1 Click  **Attendance Schemes** in the Attendance Areas panel.
- 2 Click the name of your attendance scheme. The Edit Scheme page displays.






Deleting attendance statuses

You can delete any status that is not assigned to one or more users in a register by clicking the  **Delete** icon on the Edit Scheme page.

To delete a status that is in use, first replace all instances of the status from the Attendance Data page, and then delete the status from the Edit Scheme page.

Managing attendance schemes

To manage your course attendance schemes, access them by clicking  **Attendance Schemes** on the Attendance Areas panel.

Scheme Name	Default Scheme	Actions
Organization Schemes		
System Scheme (Organization Default)	Current Default	 
Course Schemes		
Participation 	Set	 

Course Attendance Schemes homepage


If you have the proper permissions to manage organization schemes, access them by clicking the **Attendance Schemes** link in your homepage's My Admin Tools widget.

Default schemes

The System Scheme is initially set as the default attendance scheme for all org units. As you create new schemes, depending on your permissions, you can change the default schemes for your courses as you see fit.

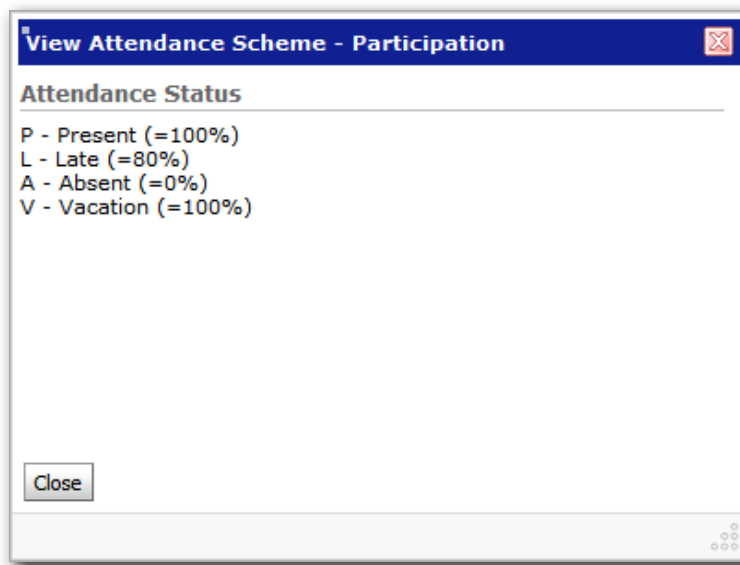
The default scheme is automatically inserted as the active selection in the **Attendance Scheme** drop-down menu when creating a new attendance register. If you delete your course's default scheme then the organization's default scheme automatically becomes the course's default scheme.

► **To set a scheme as the default for your org unit**

- 1 Click  **Attendance Schemes** in the Attendance Areas panel.
- 2 Click the **Set** button for the Attendance Scheme that you want to set as your default scheme.



Viewing attendance schemes

You can easily view the details of your attendance schemes from the Attendance Schemes page. This enables you to get a quick summary of a scheme and its statuses.




View Attendance Scheme window



► **To view an attendance scheme**

- 1 Click  **Attendance Schemes** in the Attendance Areas panel.
- 2 Click the  **View** icon in the actions column of the scheme that you want to view.

Viewing associated registers

If any of your schemes are associated with an attendance register, the  **Information** icon appears beside the scheme name on the Attendance Schemes page. Clicking the icon opens a new window listing all active registers that are using the scheme.

► **To view your scheme's associated registers**

- 1 Click  **Attendance Schemes** in the Attendance Areas panel.
- 2 Click the  **Information** icon beside the scheme that you want to view.

Changing associated attendance schemes

You can easily change the active attendance scheme for a register that does not have any attendance data. If your register has attendance data, changing the attendance scheme deletes all existing data in the register.



Important Ensure that your attendance data is no longer needed prior to changing the associated attendance scheme.


Deleting attendance schemes

You can delete course attendance schemes that are not used by any attendance registers. If you delete a course attendance scheme that is set as the org unit default, then the organization default scheme retains this status automatically.

Similarly, depending on your permissions, unassigned organization attendance schemes can be deleted at the organization level. If you delete an organization scheme that is set as the organization default, then the System Scheme automatically retains the default status.

► To delete an attendance scheme

- 1 Click  **Attendance Schemes** in the Attendance Areas panel.
- 2 Click the  **Delete** icon beside your attendance scheme.

Note If the  **Delete** icon is not visible then you are attempting to delete a scheme that is associated with a register.

Managing attendance data

Manage your course attendance data from the attendance data page. From here, you can view all of the attendance results for your register, search for specific users, access My Attendance pages, and access each session's attendance data page.

► To access the Attendance Data page for a register

Click the name of the register from the Attendance homepage.

Viewing attendance data

From the Attendance homepage, click the name of your register to access the Attendance Data page. This page displays all of the data that you have collected for your register, broken down by users and sessions.

Attendance Data – Weekly Seminar

Attendance Registers Edit Register Attendance Data

Email All Export All

Weekly Seminar

Cause for Concern (%): 80
of Sessions: 4

Attendance Data

View By: User Apply

Search For: Search [Show Search Options](#)

 20 per page


	First Name, Last Name	Sessions				Totals				% Attendance
		Week One	Week Two	Week Three	Week Four	P	L	A	V	
<input type="checkbox"/>	Frank Catcher	P	P	L	P	3	1	0	0	95
<input type="checkbox"/>	Danielle Fleur	P	L	P	P	3	1	0	0	95
<input type="checkbox"/>	Harold McLellan	P	P	P	L	3	1	0	0	95
<input type="checkbox"/>	Erin Roth	P	P	P	P	4	0	0	0	100
<input type="checkbox"/>	Jodi Singh	P	A	P	P	3	0	1	0	75 ⚠
<input type="checkbox"/>	Minh Tran	P	P	P	P	4	0	0	0	100
<input type="checkbox"/>	Peter VanBrook	P	L	A	P	2	1	1	0	70 ⚠
<input type="checkbox"/>	Miquel Mendoza	P	P	P	P	4	0	0	0	100

 20 per page

Attendance Data page

Each row displays the user, the attendance status for each session, the summary of attendance statuses, and the user's attendance percentage for the register. If any users have an overall attendance percentage that is below the **Cause for Concern**, then a ⚠ **Cause for Concern** icon displays in the % **Attendance** field.

► **To email users**


- 1 Select the users that you want to email from the user list in the Attendance Data section.
- 2 Click the  **Email** icon.
- 3 Compose your new message.
- 4 Click **Send**.

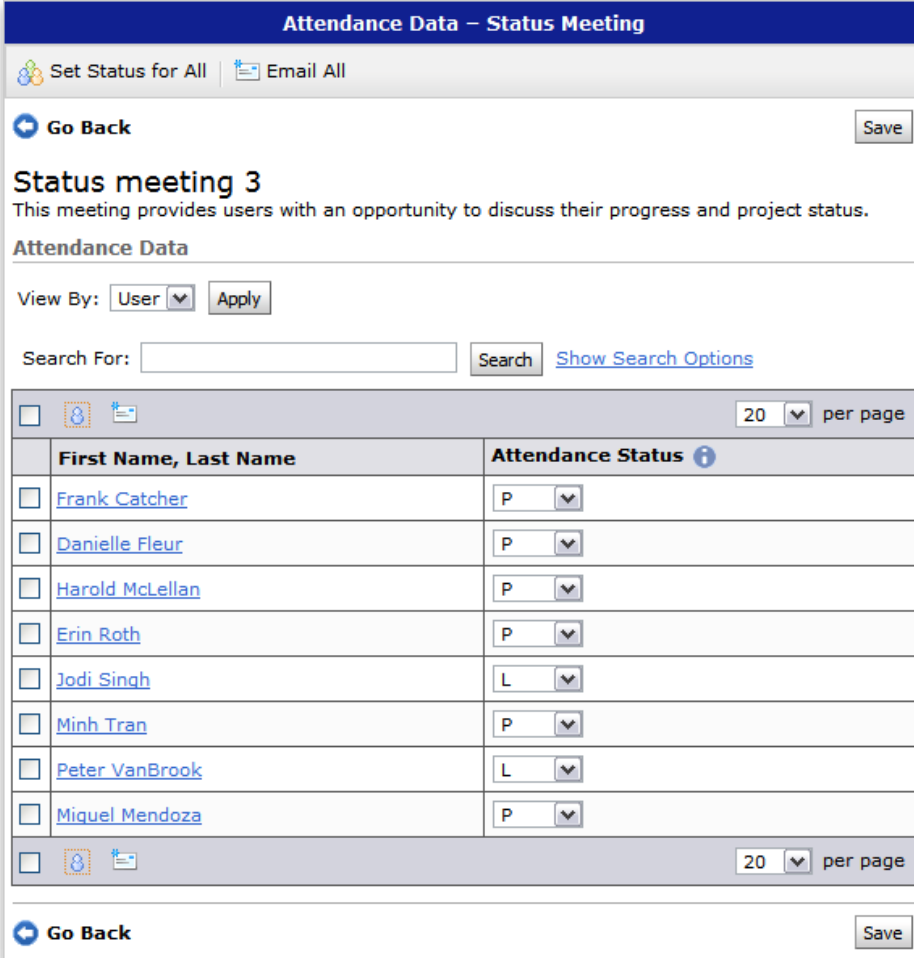
Note If you want to send an email to all users, save time by clicking the  **Email All** button on the Attendance Data action panel.

► **To export your register's attendance data**

Click  **Export All** on the Attendance Data action panel

Entering attendance data

Enter attendance data for your sessions by clicking the corresponding  **Enter Attendance Data** icon on the Attendance Data page. The session's attendance page displays.



Attendance Data – Status Meeting

Set Status for All | Email All

Go Back Save

Status meeting 3

This meeting provides users with an opportunity to discuss their progress and project status.

Attendance Data

View By: User Apply


Search For: Search [Show Search Options](#)

	First Name, Last Name	Attendance Status ⓘ
<input type="checkbox"/>	Frank Catcher	P
<input type="checkbox"/>	Danielle Fleur	P
<input type="checkbox"/>	Harold McLellan	P
<input type="checkbox"/>	Erin Roth	P
<input type="checkbox"/>	Jodi Singh	L
<input type="checkbox"/>	Minh Tran	P
<input type="checkbox"/>	Peter VanBrook	L
<input type="checkbox"/>	Miquel Mendoza	P

20 per page

Go Back Save

Sessions Attendance Data page

Use the attendance status drop-down menus to change the attendance status for your users. Alternatively, you can use the  **Set Status for All** button in the action panel to set the same status for all users.

Using My Attendance

Every user who is associated with a register has a My Attendance page. Depending on your permissions, you can preview any user's My Attendance page by clicking their name from the Attendance Data page.

Attendance for: Frank Catcher		
My Attendance		
Attendance Registers		
Register Name	# of Sessions	% Attendance
Status Meeting This meeting provides users with an opportunity to discuss their progress and project status.	10	100
Weekly Seminar This weekly seminar will be spent discussing a series of questions based on the readings for the week. I will send out the applicable questions two days prior to each seminar. Come prepared with your answers and we'll discuss how the readings fit in with some of the major themes of the course.	4	95

My Attendance page



The My Attendance page is what users without the Manage attendance registers permission see when they click the Attendance link from a course homepage. The My Attendance page lists all of the registers in which the user is enrolled for the current org unit. It includes a summary of the total number of sessions and the user's current overall attendance percentage for each register.

Tip Click on the register name to view a detailed breakdown of each session's attendance status results.

Classlist integration

If a user is unenrolled from a course, their attendance data remains accessible from the **Reports** tab in the Classlist tool. This enables you to access attendance data for users that are no longer included in your registers.

► To view attendance data from Classlist

- 1 Click the **Classlist** link on your navbar.
- 2 Click  **Report**.
- 3 In the Withdrawals section, click the  **View Attendance** icon for the applicable user.

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