

## Frequently Asked Questions

### **Attendance Promotion**

#### ***Is it necessary to perform a backup before beginning the promotion process?***

Yes, you must have created a backup of your People Suite data within the last two days before beginning the promotion process. If you have not created a backup within the last two days, you will receive an Information message indicating that you must create a backup after clicking Promote on the Promotion window. Once you have created a backup, you can restore your data in the event that you encounter issues during the promotion process, or are not satisfied with the results of your promotion.

#### ***What is the difference between the Create New Group Structure and Copy Current Group Structure?***

You should perform Promotion using the Create New Group Structure option if you want to create a new Master Group with new class structures. When performing Promotion using the Create New Group Structure, you will need to manually create your new group structure and all of its classes.

You should perform Promotion using the Copy Current Group Structure option, in addition to the Create New Group Structure option, if you want to keep markings for the current year in its own separate group and create a new group for next year. If you promote a Master Group using this option, the individuals within the group will not be automatically copied into the classes they were enrolled in during the previous year.

#### ***Why doesn't an individual's name display on the Enter/Post Attendance window after promoting?***

The records for the new year will not display unless the Posting Date value you enter on the Enter/Post Attendance window is a date within the new Attendance year. To view records for the new year, change the Posting date to a date after the first day of the new attendance year. This information also applies to viewing new groups on the Enter/Post Attendance and View/Edit Groups windows, as well as the Activities and Classes tabs of the View/Edit Individual window. This information does not apply to Reports and Searches. Master groups created in Attendance or Activities Setup are available from the Master Group option in Reports and Searches at any time.

### ***Can you promote more than one master group at a time?***

You can promote as many Class type Master Groups as you want at any time. The only limitation is that a master group can only display once in Promotion at any particular time.

### ***Can you promote from a Level 3 Master Group to a Level 1 or 2 Master Group?***

Yes, as long as the group that you want to promote was created as a Master Group on the Group List window, you can promote it to a higher level group.

### ***Can classes be deleted or added during the promotion process if the Copy Current Group Structure option is selected?***


Yes, you can add or delete a class after starting the Promotion process, although we strongly recommend that you avoid deleting any classes until you are finished with promotion. If you delete a class during the promotion process, you will erase the individual and group Attendance records associated with the class.

Any new classes that you create and individuals that you add to those classes will display on the Promotion Setup window even after you have started selecting individuals to promote.

### ***How can I configure a report to show old and new class information on one report?***

If you want to view the class the individuals are currently in as well as the class they will transfer to after promotion, you can configure the Rolls report to print the Next Year's Division, Next Year's Department, Next Year's Class, or Next Year's Position special fields.

To configure the Rolls report to show old and new class information:

1. On the Promotion menu, click **Reports**, select **Lists**, then select the **Rolls** report.
2. Click **Setup**, then select the Master Group that you are promoting.
3. Under **Report Settings**, click the box next to **Special Fields**, then click the **Select** button next to **Special Fields**.
4. Under **Column**, select Next Year's Class.
5. Click the **Add** button .
6. Repeat steps 4 and 5 for the Next Year's Division, Next Year's Department, and Next Year's Position special fields as needed. When you have finished adding the columns that you want, click **Return**.
7. **Optional:** Click **Preview** to ensure that all the information on the report is correct. If any changes need to be made, be sure to complete these changes prior to clicking **Promote** on the Promotion menu.

**Note** – When previewing your Rolls report, if the Next Year's Division, Next Year's Department, or Next Year's Class fields are blank, this indicates that the individuals were not promoted to a class.

8. Click **Print**. A Column Settings window displays. Make any necessary changes to the **Heading**, **Column Width**, or **Rotation Angle** fields, then click **OK**.

### ***Do I need to move everyone in the group even if they are staying in the same class?***

No. When performing Promotion using the Copy Current Group Structure option, you should not move individuals on the Promotion Setup window who are staying in the same class. If you move an individual that want to keep in the same group, you will create a dropped record for that individual in the previous year and a new record in the new year. In this case, after you promote, both the dropped record and the new record for the individual will remain inside the existing group, instead of continuing with the record for the individual before you performed Promotion. You should only move an individual if you want them to display for a different class.

### ***Can I change the Start Month of a group when performing Promotion using the Copy Current Group Structure option?***

No, you cannot change the start month of a group when performing Promotion using the Copy Current Group Structure option. However, you can change the Start Month when performing Promotion using the Create New Group Structure option.

### ***Can I change the start month of the new group that I am creating when performing Promotion using the Create New Group Structure option?***

Yes, when performing Promotion using the Create New Master Group Once you click Promote, you will be given an opportunity to change the start month on the Start Month window.

### ***Why are there individuals who were dropped from their classes or that do not appear in the new group after promoting?***

When performing Promotion using the Create New Master Group option, you must move the individuals that you want in the new group into a class in the new Master Group. Any individuals that you do not move to the new group when promoting using this option will remain in the previous group as Associate records, and will have a Date Removed value of the last date of the previous year.

### ***Why are asterisks (\*\*) displaying beside individual records in the former group on Attendance reports after promoting to a new group?***

When promotion to a new group is complete, all the records in the former group will have a Date Removed value equal to the last day of the former group's year, and will be transferred into Associate records, which are designated by asterisks (\*\*) beside the record. The new group will contain the current records, which are given a Date Added of the first day of the month and year for the new group.

Once you have completed the Promotion process, for the remainder of the first week, you must select an Effective Date of the first day of the month and year for the new group in order to select it from a group field. New groups are not available in the Master Group field on the Enter/Post Attendance and View/Edit Groups windows, as well as the Activities and Classes tabs of the View/Edit Individual window, unless you select an Effective Date of the first day of the month and year for a new group. Once the system date on your PC exceeds the Effective Date, the new group will automatically be available in the Master Group field.