SmartMember Omicron

Introduction

SmartMember Omicron is an online membership database with many functions to help in the administration of your church, club or society. It has been designed with the user in mind, and consequently is very easy to learn and very easy to use.

Version

Help File

Version 1.0 - 30th Aug 2010

Getting Started

Basics

- SmartMember is very easy to use and learn
- Members are grouped into families
- A member is either a Head, Spouse or Child
- Simply follow the instructions to display/edit members
- "Guest" logon already has members in the database

System requirements

SM Omicron requires an internet connection and browser.

Logging On

For active users, enter your username and password

For the demo enter "guest" for the username, and "guest" for the password, without the quotes.

Note that SM allows multiple users from the same organisation to be logged on at the same time, looking at the same data.

New User

There is no limit to the number of users per organisation, and they can be logged on at the same time, looking at the same data.

To create a new user, click on NEW USER at the bottom of the login page.

SM will ask you for the following information:

FIELD	EDITABLE	DESCRIPTION
Username	yes once only	This can be e.g. your first name. SM will add a suffix unique to you. So John will become e.g. John-GEH120 If you have more than one user in your organisation, please contact Ocessa Group to modify the username so that you will all be able to access the same data.
Password	yes once only [future upgrade]	This password is the user's choice
Confirm Password	yes once only [future upgrade]	Retype your password
E-mail	yes once only [future upgrade]	Your e-mail
Organisation	yes once only [future upgrade]	Name of your organisation. This will be displayed at the top of the Main page in SM.
Country	yes once only [future upgrade]	The country you live in.
Group	no [future upgrade]	New - cannot be changed by user at this time
User Type	no [future upgrade]	dbadmin - cannot be changed by user at this time. Allows full unrestricted access to members' data. Future modifications will allow restricted access to data.

Click on CREATE USER. Username is now active.

The fields that are shown as [future upgrade] can be modified by the user as many times as they like in a future upgrade.

Add new record

To add a new member click on ADD NEW RECORD.

SM will display the GENERAL page. The details need to be filled in. The following fields are **compulsory**:

FIELD	Type	NOTES
First Name	compulsory	
Surname	compulsory	
Sex	compulsory	
Family Position	compulsory	e.g. Head, Wife, Spouse, Partner
Family ID	compulsory	Select NEW FAMILY or select a family that already exists
Member Status	compulsory	e.g. Active, Left, Current

Note: Sub Member Status e.g. Studying Away is found on the ROLES/TEAMS page

All other fields are optional.

The Organisation is populated automatically.

Overview

Small Groups

A Small Group is a term normally used by churches to describe a group of people that have regular meetings, usually once a week, where they have a time of spiritual reflection and fellowship. There is usually at least one leader, meeting at the leader's home.

Small Groups have different names in different churches e.g. Cell, Home. SM allows the user to change the name of the Small Group in the Org Admin Menu

[Future upgrade] will allow greater details to be entered for the Small Group.

Groups

Each organisation can be part of a GROUP. This allows reports/statistics to be calculated for the individual organisation or for the whole group. If a company has several branches in a particular sector, then each branch can b e part of a group. Or if a church has planted another church in the area, or has more than one congregation on a Sunday, then each congregation can be part of the same group. Any dropdown lists that are created for the group, will be available to the rest of the other churches/offices in the group.

The Group access is defined by the USER not the organisation. So a particular user could have access to the whole group, but another user would only have access to one organisation.

Groups are currently managed by Ocessa Group. [Future upgrade] will allow the organisation to manage Group access themselves.

Menu Bar

Home

Home will take you to the [MAIN page]

Reports

This takes the user to the REPORTS page where the user can select the report required from a dropdown list.

The Reports that are currently available are:

NAME OF REPORT	DESCRIPTION
Birthday	List of birthdays and other information including age at next birthday
CRB	List of CRB details
Directory (Birthday & Anniversary)	Directory listing for each member including birthday and anniversary
Directory (Families)	Directory listing grouped by family, useful as a comprehensive contact directory. The order of the list of names is Head, Wife, Husband, Spouse, Partner and then Child. For more than one child, the order of the children will be the oldest first.
Directory (Families minus children)	same as above but adults only
Directory (Individual)	Directory listing for each member
Team List	List of each team with contact details for each member
Training	List of training courses attended by each member

Reports can be EXPORTED as a PDF or EXCEL format.
Simply "Select a format" from the dropdown list at the top of the report, and click EXPORT to the right.

Org Admin

Org Admin has 3 functions:

Add SM Group

This takes the user to the SMALL GROUP ADMIN page where the user can add a new Small Group. This new group is then added to the list of Small Groups in Roles/Teams for addition to a member.

Edit SM Label

Different churches/organisations have different names for Small Groups, e.g. Cell, Life, Interest, Smile. This allows the user to select the name used for their organisation, which is then changed in the Roles/Teams page.

Export Data

This function allows all the data in SM to be exported as a CSV file for backup purposes, or for manipulation. There are currently 8 groups of data that need to be exported:

Details
Extra Info
Code Lists for Extra Info
Teams

Roles
Small Groups
Small Groups List
Tracking

The file name is preceded by the organisation code e.g GEH120_details.csv and can be imported into Excel if you wish.

Help

Displays this Help file

Contact Us

Links to the Contact section of the Ocessa Group website

Log In / Log Out

Logs out of current session

Language Selector

Currently English (UK) only. Future versions will include other languages.

Pages

Anniversary

PURPOSE

To store Birthday and Anniversary dates.

LOCATION

This is selected via the ANNIV page.

ADD/EDIT BIRTHDAY

This stores BIRTHDAY details including age at next birthday, and number of days due.
To EDIT this information, click EDIT on the left hand side.
This information is used in reports showing Birthday details.

DELETE BIRTHDAY

Birthdays cannot be deleted. Simply clear the Birthday field manually and then press UDPATE.

ADD/EDIT ANNIVERSARY

The ANNIVERSARY details are stored below the BIRTHDAY details.

To add an anniversary, click EDIT on the left hand side.
Select the Anniversary Type from the dropdown list.

If the Type required is not there, select ---New Anniversary Type--- and enter the Type required in the box below.
Click on UPDATE ANNIVERSARY TYPE and the dropdown list will be updated with the new selection.
The Anniversary Type can now be selected.

Enter the date required and select UPDATE on the left hand side.
The data is now stored.
To abort this process, click CANCEL on the left hand side.

DELETE ANNIVERSARY

To DELETE an Anniversary, click on DELETE on the right hand side.

Confidential Page

PURPOSE

To store Confidential data.

LOCATION

This is selected via the PERSONAL page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION

Sexual Orientation	yes	Select from dropdown list
Dietary Requirements	yes	
Allergies	yes	
Doctor's Name	yes	Name of GP/Physician
Doctor's Address	yes	Address of GP/Physician
Doctor's Telephone	yes	Telephone of GP/Physician
Notes	yes	Any extra notes required

This page is restricted to certain user accounts [future upgrade - currently available to all]

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes.

Contact Page

PURPOSE

To store extra contact details from a standard list or user defined category, in addition to Preferred Telephone and Preferred E-mail on the GENERAL page.

LOCATION

This is selected via the CONTACT page.

DISPLAY

The user can select from a list or add a user defined contact type.

FIELD	EDITABLE	DESCRIPTION
Contact Type	yes	Select from dropdown list
Contact Data	yes	Enter data e.g. e-mail address or phone no.
Ex-Dir	yes	Ex-directory - won't be added to any reports

ADD/EDIT RECORD

To add a Contact, click EDIT on the left hand side.
Select the Contact Type from the dropdown list.

If the Type required is not there, select ---New Contact Type--- and enter the Type required in the box below.
Click on UPDATE CONTACT TYPE and the dropdown list will be updated with the new selection.
The Contact Type can now be selected.

Enter the information required and select UPDATE on the left hand side.
The data is now stored.
To abort this process, click CANCEL on the left hand side.

DELETE RECORD

To DELETE a Contact, click on DELETE on the right hand side.

NOTES

The EX-DIR (ex directory) field is used for reports [future upgrade]

CRB Page

PURPOSE

To store related CRB (Criminal Records Bureau) checks.

LOCATION

This is selected via the CRB page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	NOTES
CRB Registered	yes	Yes or No
CRB Disclosure No.	yes	
CRB Requested Date	yes	
CRB Issue Date	yes	
CRB Expiry Date	yes	

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes.

Custom Page

PURPOSE

Customised page for the organisation [future upgrade].

LOCATION

This is selected via the CUSTOM page.

For future development

CV Page

PURPOSE

To store CV details of various categories, either from a list or user defined.

LOCATION

This is selected via the PERSONAL page.

DISPLAY

FIELD	EDITABLE	DESCRIPTION
Category	yes	Can be selected from list or user defined
Notes	yes	extra notes

ADD/EDIT RECORD

To add a CV entry, click EDIT on the left hand side.

Select the CV Type from the dropdown list.

If the Type required is not there, select ---New CV Type--- and enter the Type required in the box below.
Click on UPDATE CV TYPE and the dropdown list will be updated with the new selection.
The CV Type can now be selected.

Enter the information required and select UPDATE on the left hand side.
The data is now stored.
To abort this process, click CANCEL on the left hand side.

DELETE CV ENTRY

To DELETE a CV entry, click on DELETE on the right hand side.

DBAdmin Page

PURPOSE

To display storage-related data concerning the member

LOCATION

This is selected via the DBADMIN page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION
Awaiting Approval	yes	New member can enter their details directly online - this field indicates that the staff need to verify the data before being accepted into the SM database - [future upgrade]
Personal ID	no	For reference when reporting an issue
Family ID	yes	This can be changed so that a member can be moved to a new/different family
Organisation	yes	This can be changed so that a member can be moved to a new/different organisation - see below for more details
Date of Entry	no	Date the data was entered into the database
Date Last Modified	no	Date the last change was made
By Whom	no	For audit purposes - shows who made the last change

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes

Family Page

PURPOSE

To list other family members.

LOCATION

This is selected via the FAMILY page.

DISPLAY

The FAMILY page calculates the number of children and displays all members of the family in a grid.

The available fields are as follows

FIELD	EDITABLE	DESCRIPTION
Position	yes	Can be either: HEAD WIFE HUSBAND SPOUSE PARTNER CHILD Each family needs to have a HEAD of the household. This is so that when a directory is produced, the first person in the list of names will be the Head, followed by the order given above, i.e. Wife, Husband, Spouse etc.
No. of Children	no	calculated automatically
Family Notes	yes	extra notes

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes

General Page

PURPOSE

To store frequently used data for the member.

LOCATION

This is selected via the GENERAL page or by pressing MORE INFO on the MAIN page.

DISPLAY

The available fields are as follows

FIELD	EDITABLE	NOTES
Name	no	the name is made up of the Surname followed by the Pref. Forename (or Christian Name if Pref. Forename is blank)
Membership No.	yes	optional
Title	yes	Mr, Mrs, Miss, Ms, Dr, Rev etc
First name	yes	
Middle name	yes	
Surname	yes	
Pref. Forename	yes	this is the "Correspondence Name" and is used to display the member's name instead of the official Christian Name
Sex	yes	
Family Position	yes	Head, Wife, Husband, Spouse etc. See FAMILY PAGE for more details
Family ID	yes	Name of the head of the household
Member Status	yes	Active, Current, Left etc. - some reports subdivide the data into

		Member Status
Contact Only	yes	Sometimes it's useful to have people on the database who are associated with the organisation, but not members of it, for administration purposes e.g. electrician, plumber, Fire Safety inspector. Note that these entries are NOT INCLUDED in report statistics
Company	yes	Company name goes here, especially if Contact Only is selected
Organisation	no	The organisation is automatically displayed
Select Address	yes	in EDIT mode only: allows user to select address that already exists to save re-typing it in.
Address Lines	yes	Several lines of address
Postcode	yes	
Country	yes	
Address Ex-Dir	yes	If checked, the address is ex-directory and will not be displayed on reports
Preferred Telephone	yes	The contact phone no. that is preferred as a first point of call
Telephone Ex-Dir	yes	If checked, the telephone no. is ex-directory and will not be displayed on reports
Preferred E-mail	yes	The e-mail address that is preferred.

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes.

ADD A NEW RECORD

To add a new record, click on ADD NEW RECORD.

For more information, see Add New Record

RECORD NAVIGATION

The bottom of the page shows a LEFT arrow to move to the PREVIOUS record, and a RIGHT arrow to move to the NEXT record. The current record and total no. of records is also shown.

Main Page

PURPOSE

To display list of organisation's members.

LOCATION

This is selected via the MAIN page or by pressing HOME on the menu. It is the first page the user is taken to after initial login.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION
Login	no	shows the current user logged in
Organisation	yes	allows the user to select which organisation data to display

Member Status	no	selecting a Member Status from the dropdown list will filter the member list in the grid accordingly
Member Search	yes	selecting a member from the dropdown list will take the user to the member's details on the Main page
Total	no	displays the total no. of records in the grid

ADD NEW RECORD

To add a new member to the database click on ADD NEW RECORD. See Add New Record for more info.

MORE INFO

To see the member's details on the GENERAL page, click on MORE INFO.

DELETE

To delete a member, click on DELETE. If this is done accidentally, the data can be restored. Contact Ocessa Group for more information.

Personal Page

PURPOSE

To store important extra information.

LOCATION

This is selected via the PERSONAL page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION
Emergency Contact	yes	whom to call in an emergency
Marital Status	yes	
Additional Needs	yes	e.g. special needs
Maiden Name	yes	
Ethnic Category	yes	
Country of Origin	yes	
CRB Registered	yes	yes or no. same field used in CRB page - uses tickbox
First Language	yes	
Deaf	yes	e.g. hard of hearing, totally deaf, needs hearing aid

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes.

Photos Page

PURPOSE

To display photos of members

LOCATION

This is selected via the PHOTOS page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION
Image	yes	picture of member - no limit to file size or number of pictures picture formats supported: GIF, BMP, JPG
Title of Image	yes	each picture can have its own title
Full size	n/a	Click on this to display full size of the image

ADD/EDIT RECORD

To EDIT click on EDIT RECORD
Click BROWSE to select the image from your PC
Enter the TITLE of the image and then click on UPLOAD when finished.
Photo is transferred to the member record and stored in the database. This means the image will be displayed even if removed from the PC.

Select RETURN to abort any changes

DELETE RECORD

To DELETE click on DELETE on the right hand side

Roles/Teams Page

PURPOSE

To display/edit Member Status, Member Sub Status, Small Group, Roles & Teams

LOCATION

This is selected via the ROLES/TEAMS page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION
Member Status	yes	e.g. Active, Current, Expelled, Left
Member Sub Status	yes	e.g. Studying Away, On Sabbatical. This is shown in the Directory (Families) in brackets for emphasis
Small Group	yes (more than one entry permitted)	A member can be a member of more than one Small Group
Roles	yes (more than one entry permitted)	A role is a position within the organisation e.g. Cell Group Leader, Work Supervisor, Pastor
Teams	yes (more than one entry permitted)	A team is a group that the member is a part of e.g. Singer, Deacon, Sales Team

ADD/EDIT RECORD

Please note for Small Group, Roles & Teams, you can have more than one entry

To add an entry, click EDIT on the left hand side.

Select the Type from the dropdown list.

If the Type required is not there, select ---New Type--- and enter the Type required in the box below.
Click on UPDATE / ADD.
The data is now stored.
To abort this process, click RETURN on the bottom right hand side.

DELETE RECORD

To DELETE click on DELETE on the right hand side

Tracking Page

PURPOSE

To store Tracking data of appointments with members for e.g. Counselling visits, pastoral care, follow up for new visitors.

LOCATION

This is selected via the CONTACT page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	DESCRIPTION
Date of Visit	yes	date of proposed visit
Time of Visit	yes	time of proposed visit
Location	yes	location of visit e.g. home
Purpose	yes	purpose of visit
Who	yes	person who will be making the visit
Notes	yes	extra notes

ADD/EDIT RECORD

To ADD or EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes.

DELETE TRACKING ENTRY

To DELETE a TRAINING entry, click on DELETE on the right hand side.

NOTES

Report will be added [future upgrade]

Training Page

PURPOSE

To store TRAINING details of various categories, either from a list or user defined.

LOCATION

This is selected via the PERSONAL page.

DISPLAY

FIELD	EDITABLE	DESCRIPTION
Course Name	yes	name of course
Course Date	yes	date course took place
Renewal Date	yes	date course needs to be repeated
Notes	yes	extra notes

ADD/EDIT RECORD

To add a TRAINING entry, click EDIT on the left hand side.
Select the TRAINING Type from the dropdown list.

If the Type required is not there, select ---New TRAINING Type--- and enter the Type required in the box below.
Click on UPDATE and the dropdown list will be updated with the new selection.
The TRAINING Type can now be selected.

Enter the information required and select UPDATE on the left hand side.
The data is now stored.
To abort this process, click CANCEL on the left hand side.

DELETE TRAINING ENTRY

To DELETE a TRAINING entry, click on DELETE on the right hand side.

NOTES

Report will be added [future upgrade]

Work Page

PURPOSE

To store Work or School data.

LOCATION

This is selected via the WORK page.

DISPLAY

The available fields are as follows:

FIELD	EDITABLE	NOTES
Job title	yes	
Workplace 1	yes	
Workplace 2	yes	
School / College	yes	
School Year	yes	this is calculated automatically depending on date of birth of the child (UK based)
Update School Year	n/a	this button recalculates the school year
School Year Protect	yes	yes or no. This stops the school year from being updated automatically.

EDIT RECORD

To EDIT click on EDIT RECORD and then click on UPDATE when finished.
Select CANCEL to abort any changes.

FAQ

FAMILY

Can SM allow more than one wife?
Yes. In some cultures it is normal to have e.g. 8 wives, so if the husband becomes a Christian then SM will be able to store details of his whole family.

Is SM gay friendly?
SM allows same sex relationships.